IMATS

Inventory Management & Tracking System

COUNTERMEASURE TRACKING SYSTEMS (CTS)

INVENTORY MANAGEMENT AND TRACKING SYSTEM (IMATS)

RELEASE 1.9

USER GUIDE

May 2017

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CDC Public Health Informatics

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Chapter 1: Getting Started

Introduction

The Centers for Disease Control and Prevention (CDC) Countermeasure Tracking Systems (CTS) Inventory Management and Tracking System (IMATS) allows state and local public health to track medical and non-medical countermeasure inventory and supplies during daily operations or a public health emergency. The system includes functions such as receipts, put away, and shipping. These functions allow users to enter detailed information about assets, such as total number received, lot number, expiration date and storage location.

IMATS is deployed on the CDC network. CDC requires a level of security to ensure the protection of private and/or sensitive information from unauthorized disclosure, loss, or damage. The CDC Secure Access Management Services (SAMS) is an access management system that is designed to authenticate users and allow access to applications for which access rights have been granted. SAMS is the next generation replacement for CDC's legacy Secure Data Network (SDN) portal and does not require the use of digital certificates. SAMS will function as the access gateway to IMATS, as well as the other CTS programs.

This document is intended to help administrators configure IMATS for use in their planning jurisdictions. There are two standard roles in IMATS—the Public Health Administrator (PHA) and the Facility Administrator. The PHA role will be granted to users with high-level management or oversight responsibilities for a project area (one of CDC's 62 Public Health Emergency Preparedness Cooperative Agreement grantees, which include 50 states, four directly funded localities, three U.S. territories, and five freely associated states). The Facility Administrator is an individual who manages one or more facilities. This role is granted to administrators who do not fit in the PHA role and may be used for local or regional managers.

This document provides separate sections for the PHA role and the Facility Administrator role with the steps necessary to set up IMATS for use. Options for setting up IMATS are included in **APPENDIX B: Setup Options**. Additionally, **APPENDIX C: Tasks** includes a series of tasks that can be provided to new users as a training tool.

You'll find IMATS training material on the IMATS webpage. Additional materials are currently being developed and will be added to the webpage as they become available. All IMATS questions should be submitted to CTSHelp@cdc.gov.

Useful Tips

- For online help, select the "?" icon at the top right corner of each page to access documentation information.
- Use the application's **Back** button, when available, to return to the previous page.
- Use the application's **Next** button, when available, to continue to the next page.
- Use the **Add** button to save a new item.
- Use the **Done** button to exit the Add function.
- Information must be entered into those data fields marked with a red asterisk (*). Those fields cannot be left blank. You will not be able to proceed until these fields are populated.
- Based on information previously entered, you might be required to populate certain additional "conditional" data fields even though they are not marked with a red asterisk (*).
- IMATS contains two standard roles—PHA and Facility Administrator. Additional roles may be added using the Custom Roles process located under the **Setup** menu.
- The **Products** sub-menu found under **Setup** is used to configure product information, such as name, manufacturer, and National Drug Code (NDC)/stock number. Information regarding actual inventory is added using the **Inventory Management** menu.
- To view the current inventory in a facility, use the Inventory Management>Inventory>Search Inventory function. This is where a user will have the opportunity to make manual adjustments if permission has been granted. Steps for these processes can be found in the online help documentation.
- There may be minor differences between the version of IMATS you evaluate and the production version. These differences should not affect your evaluation.
- **APPENDIX B: Setup Options** provides several alternatives for configuring IMATS.
- If you need assistance or have any questions, please contact the IMATS support staff at CTSHelp@cdc.gov.

Roles in IMATS

- IMATS is designed to support the typical roles of two user types—Public Health Administrator (PHA) and Facility Administrator (FA).
  - The PHA role is designed for state-level or project-area level administrators. By default, users assigned this role will have access to all data created for facilities in their project area.
  - The FA role is designed for users responsible for managing one or more facilities.
- Custom roles also can be created. They are defined according to specific duties within a project area or facility.

  For example, a custom role named "Pick Team" could be created. Persons assigned to the team could be granted access permissions to the pick and ship functions only.

Chapter 2: Setup Menu Functions

The Setup menu contains administrative functions used to configure the system for use and to add new items once the system is in use.

Facilities

- A *facility* is a warehouse or site where countermeasure products are stored.
- A *storage location* is a physical space within a facility designated for product receiving or storage. For example, “Receiving Dock — A.”
- Each facility must contain at least one storage location.
- Facilities and storage locations must be added to the database before adding product inventory.

Search Facilities

1. On the menu, click **Setup**, **Facility**, and then **Search Facilities**.

   Note: When searching, keep in mind that the more search criteria you enter, the more likely you are to find the facility you are looking for.

2. Enter information in one or more of the following fields:

Field	Description
Facility	Name of the facility. Enter one or more characters that exist anywhere within the facility name. This can be a partial or complete word. For example, you could enter "Best Care Hospital" or "best".
Project Area Does not display for all user roles.	Project area the facility belongs to.
Region	Region within the project area where the facility is located. Enter one or more characters that exist anywhere within the region name. This can be a partial or complete word. For example, you could enter "Region One" or "egio".
County	County where the facility is located.
Jurisdiction	Jurisdiction within the project area where the facility is located. Enter one or more characters that exist anywhere within the jurisdiction name. This can be a partial or complete word. For example, you could enter "Big Jurisdiction" or "urisd".

3. Click the **Search** button. The results display in the lower portion of the page.

   You can scroll through the list using the page numbers at the bottom of the page.

View or Edit a facility

- Click the link in the **Facility Name** column to display the facility's information.

Delete a facility

- Click the link in the **Facility Name** column to display the facility's information.
- Click the **Delete** button. A confirmation message displays.
- Click the **OK** button. The system deletes the facility.

Perform a new search

- Click the **Clear** button, and then enter new search criteria.

Add Facilities

Create facilities in your project area.

1. On the **Setup** menu, click **Facility**, and then **Add Facility**.
2. Under **New Facility**, enter the following information:

Field	Required?	Description
Project Area	Yes	Project area where the facility belongs.
Region	No	Region within the project area where the facility is located.
Facility Name	Yes	Name of the facility.
Status	Yes	Status of the facility. • **Active:** Supplies **can** be shipped to this facility. • **Inactive:** Supplies **cannot** be shipped to this facility. The facility will not be listed in any of the drop-down lists throughout the system, nor will it appear in any searches. Additionally, users cannot be assigned access to an inactive facility.
Type of Distribution Site	Yes	Designates the type of distribution site (for example, a local or regional distribution center, State RSS. POD, etc.).

Field	Required?	Description
RSS Site Priority	Conditional	Required only if Type of Distribution Site is State RSS.
Facility Type	Yes	Type of facility (for example, a hospital or local health department).
Facility Type, Other	Conditional	Required only if Facility Type is Other.
POD, Closed Type	Conditional	Required only if Facility Type is POD, Closed.
POD, Closed Type Other	Conditional	Required only if POD, Closed Type is Other.
Notes	No	Any text that you feel would be helpful to include.

3. Under **Ship to Address**, enter the following information:

Field	Required?	Description
Address Line 1	Conditional*	Facility’s street address.
Address Line 2	No	Continuation of the street address, if needed.
Longitude	Conditional*	Facility’s longitude.
Latitude	Conditional*	Facility’s latitude.
City	Yes	City where the facility is located.
State	Yes	State where the facility is located.
Zip Code	Yes	Facility’s zip code.
County	No	County where the facility is located.

*Either the street address **or** longitude/latitude must be entered.

4. Under **Receiving Capabilities**, enter the following information:

Field	Required?	Description
Loading Dock(s) Available	No	Select if the facility has one or more loading docks.
Number of Loading Docks	Yes: If **Loading Dock(s) Available** selected.	Number of loading docks in the facility.
Accommodate 53-foot Trailer	No	Select if the facility can accommodate a 53-foot trailer.
Maximum Truck Size	No	Maximum truck size the facility can accommodate.
Fork Lift Available	No	Select if the facility has a fork lift that can be used.
Lift Gate Available	No	Select if the facility has a lift gate that can be used.

5. Under **Primary Contact**, enter the following information:

Field	Required?	Description
Primary Contact	Yes	Facility’s primary point of contact.
Telephone	Yes	Phone number of the primary contact.
Ext	No	Extension of the primary contact’s phone number.
Cell Phone	No	Cell phone number of the primary contact.
Fax	No	Fax number of the primary contact.
Email Address	Yes	Email address of primary contact.

6. Under **Secondary Contact**, enter the following information:

Field	Required?	Description
Secondary Contact	No	Facility's secondary point of contact.
Telephone	No	Phone number of the secondary contact.
Ext	No	Extension of the secondary contact's phone number.
Cell Phone	No	Cell phone number of the secondary contact.
Fax	No	Fax number of the secondary contact.
Email Address	No	Email address of secondary contact.

7. Click the **Add** button to add the facility.

Edit a Facility

1. Follow the steps listed in the **Search Facilities** section to find the facility to be updated.
2. Make the necessary updates on the **Edit Facility** page.
3. Click the **Save** button and then the **Back** button. The system saves the changes you made and displays the previous page.

Add Storage Locations

1. On the **Setup** menu, click **Facility**, and then **Add Storage Location**.
2. Under **New Storage Location**, enter the following information:

Field	Required?	Description
Project Area	Yes	Project area to which the storage location is assigned.
Facility	Yes	Facility within the project area to which that storage location is assigned.

3. Under **Location**, enter the following information:

Field	Required?	Description
Name	Yes	Name of the storage location.
Receiving Area **Check box**	No	Select this check box if the location is used only to receive items, not to store them on a more permanent basis.
Type	Yes	Defines the type of items stored in the location.
Type text box Enabled only if the **Type** field is **Other**	Yes: If it is enabled	Enter the type of items stored in the location.
Status	Yes	Status of the storage location. • **Available:** Inventory can be stored in the location. • **Blocked:** Inventory cannot be assigned to the location by the system; it must be stored manually. • **Inactive:** Inventory cannot be stored in the location because it is not being used. • **Full:** Inventory cannot be stored in the location because it is full.
Square Footage	No	Square footage of the storage location; numbers and decimal points are allowed.
Notes	No	Any text you feel it would be helpful to include.

4. Click the **Add** button. The system saves the storage location and displays it on the right side of the page.

To add a range of storage locations:

1. On the **Setup** menu, click **Facility**, and then **Add Range of Storage Locations.**
2. Under **Add Range of Storage Locations**, enter the following information, if the fields display on your screen:

Field	Required?	Description
Project Area	Yes	Project area to which the storage location is assigned.
Facility	Yes	Facility within the project area to which that storage location is assigned.

3. Under **Location**, enter the following information:

Field	Required?	Description
Name	Yes	Designates the main area where the range of storage locations is. For example, you might enter **Room 100** or **Receiving**.
Receiving Area check box	No	Select this check box if the location is used only to receive items, not to store them on a more permanent basis.
Type	Yes	Defines the type of items stored in the location.
Type text box **Enabled** only if the **Type field** is **Other**	Yes: If it is enabled	Enter the type of items stored in the location.
Status	Yes	Status of the location. • **Available:** Inventory **can** be stored in the location. • **Blocked:** Inventory **cannot** be assigned to the location by the system; it must be stored manually. • **Inactive:** Inventory **cannot** be stored in the location because it is not being used. • **Full:** Inventory **cannot** be stored in the location because it is full.
Square Footage	No	Square footage of the storage location; numbers and decimal points are allowed.

4. Under **Location Ranges**, enter the following information for **each** level you want to add:

Field	Required?	Description
Start Range	Yes	First number (or letter) in the level.
End Range	Yes	Ending number (or letter) in the level you are adding.

If you would like to include a separator between the levels, select one in the **Range Separator** field.

What is a separator?

A separator (a space, dash, comma, etc.) is placed between the levels in a location. Using a separator can make reading the location a little easier.

For example, if you have a location named **Floor 5Section 3Shelf 2**, you could add a comma between the levels so that the location would read **Floor 5, Section 3, Shelf 2**.

5. If desired, do one of the following:
   - Click the **Preview Locations** link to view the storage locations you have created so far.
   - Click the **Clear Location Ranges** link to delete the information you have entered.

   Note: This action cannot be undone, so confirm that the location naming convention is correct before creating a range of locations.

6. Click the **Add** button. The system saves the range of locations; unlike other Add pages in IMATS, the newly added locations are not displayed on the right side of the page.

Import Local Data

The Import feature provided in IMATS allows users to upload data from their existing inventory management system(s). The local data will have to be translated into the proper format(s), as described below. Users may choose to use the Import feature or manually input their data.

The Import function appends new records into the database and is not intended to be used to update current inventory data.

For a successful data import into IMATS, be sure to import in the following order:

1. Facilities
2. Storage Locations
3. Users
4. Suppliers
5. Products
6. Units of Measure
7. Inventory
8. Purchase Orders

Note: You can find import templates on the IMATS webpage.

1. At the top of the page, click **Setup**, and then **Import**.
2. Under **Import Data**, enter the following information:

Field	Required?	Description
File	Yes	Name of the file containing the data you want to import. Do one of the following: • Enter a filename. • Click the **Browse** button to select the file.
Import Data File Type	Yes	File type you want to import. File formats are listed in the following sections.
Project Area	Conditional (Depends upon your user role)	Project area the users belong to.
Facility	Conditional (Depends upon your user role)	Facility within the project area where material/user is located.

3. Click the **Preview** button. The file displays so that you can make sure it is the one you want to import.

   The import files should not contain a column heading row. If using the import templates provided above, export the data to a tab-delimited text file, open the text file, delete the first row, and then save the file.

4. Is the correct file displayed?
   - If **Yes**, continue to the next step.
   - If **No**, click the **Back** button, and repeat the previous two steps.

5. If you're importing users, do the following:
   - Click the **Next** button, and continue to assign permissions.
   - In the **Available Permissions** list, all permissions are selected. De-select the check box next to each permission you do not want to assign to the users. To select/deselect all permissions, select the **Select/Deselect all** check box.

     Note: You must select at least one permission.

   - Click the **Import** button. A confirmation message displays stating that the file will be loaded into IMATS.
   - Click the **OK** button. The system imports the file from your computer and processes it so that the users can log in and use IMATS.

6. Click the **Import** button. A confirmation message will display stating that the file will be loaded into IMATS for the selected facility.

7. Click the **OK** button. The system imports the file from your computer and processes it so that you can view the items.

   If the file is not formatted properly, the issues will be flagged with the icon. Fix any data issues and import the file.

Export Data

- The Export feature in IMATS enables users to download data from IMATS.

- The data exported from IMATS are formatted so they can be imported into another instance of IMATS (i.e., from IMATS to IMATS Training).

- Data on these topics can be exported from IMATS

    - Facilities
    - Inventory
    - Storage Locations
    - Products
    - Purchase Orders
    - Suppliers
    - Units of Measure
    - Users

1. On the menu, click **Setup** and then **Export**.
2. Under **Export Data**, enter the following information:

Field	Required?	Description
Export Data File Type	Yes	Type of data you want to export (facilities, purchase orders, etc.).
Project Area	Yes	Project area you're exporting the data from.
Facility This field doesn't display if you're exporting facilities.	Yes	Facility within the project area you're exporting the data from.
Include Header Row	Yes	Designate whether or not you want the export file to contain a header row. The header row is useful when viewing the exported file in another application. For example, when using Microsoft Excel to view a file with a header row, the row will translate to column headings in Excel. This makes it easier to figure out what each field is.

3. Click the **Export** button. A message displays asking if you'd like to open the file or save it to your computer.

Products

- A *product* is a configured item(s). Configuration information such as the product name and product number (National Drug Code (NDC) for pharmaceuticals or stock number for non-pharmaceuticals) is required.
- The information on products listed in the Orange Book is preloaded into IMATS.
- Once products are configured in the system, their inventory data may be entered.

Search Products

1. On the menu, click **Setup, Product**, and then **Search Products**.

   Note: When searching, keep in mind that, the more search criteria you enter, the more likely you are to find the product you are looking for.

2. Enter information in one or more of the following fields:

Field	Description
Project Area	Project area where the product is used.
Facility	Facility within the project area where the product is used.
Include Global Products check box Does not display for all user roles.	Select if you want to include in the search those products that are part of the common repository of products pre-loaded into IMATS. These products will be displayed in the results, along with the products that meet the search criteria shown in the **Project Area** and **Facility** fields.
Product Name	Name of the product. Enter one or more characters the name begins with.
Product Item Number	Product's NDC or stock #/model #. Enter a partial or complete number.
Product Description	Text that describes the product. Enter one or more characters that exist anywhere within the product description. This can be a partial or complete word. For example, you could enter "chloride" or "orid".
Manufacturer	Company that manufactured the product.

3. Click the **Search** button. The results display in the lower portion of the page.

   You can scroll through the list using the page numbers at the bottom of the page.

View or edit a product

- Click the link in the **Product Name** column to display the product's information.

Delete a product

- Click the link in the **Product Name** column to display the product's information.
- Click the **Delete** button. A confirmation message displays.
- Click the **OK** button. The system deletes the product.

Perform a new search

- Click the Clear button, and then enter new search criteria.

Add Product Information

1. On the **Setup** menu, click **Product**, and then **Add Product**.
2. Under **New Product**, enter the following information:

Field	Required?	Description
Project Area	Conditional (Depends upon your user role)	Project area to which the product is assigned. If a project area is not selected, the product will be assigned to all project areas.
Facility	Conditional (Depends upon your user role)	Facility or facilities within the project area to which that product is assigned. If a facility is not selected, the product will be assigned to all facilities in the project area.
Product Item Number	Yes	Product identifier. Enter the number, and then select either **National Drug Code (NDC)** or **Stock Number or Model Number**.
Product Name	Yes	Name of the product.
Package Description	Yes	The lowest unit that represents how the product is packaged. If an antibiotic is packaged as capsules in a bottle, the package description could be listed as **Bottle of 25**.
Strength	No	Strength of the product when administered or dispensed (for example, 75 mg).
Size Enabled only if **Product Item Number** field is	No	Size of the product (for example, medium or large).

Field	Required?	Description
Stock Number or **Model Number**		
Product Description	No	Any text helpful in describing the product.
Manufacturer	No	Company that manufactured the product. A manufacturer is a type of supplier. If you don't see the manufacturer you are interested in, use the Add Supplier link to add a new supplier.
Notes	No	Any helpful text to include.

3. Click the **Add** button. The system saves the product and displays it on the right side of the page.

Edit a Product

1. Follow the steps listed in the **Search Products** section to find the product to be updated.
2. Make the necessary updates on the **Edit Product** page.
3. Click the **Save** button and then the **Back** button. The system saves the changes you made and displays the previous page.

Assign Unit of Measure to a Product

Assigning a unit of measure (UOM) helps facilitate the process of ordering, receiving, back ordering, and picking products.

For example, you might often receive a particular product into your facility as a case of 2,500. Assigning this UOM (case of 2,500) means it will display as an option when receiving, ordering, back ordering, and picking the item.

Select a product:

1. On the menu, click **Setup**, **Product**, and then **Assign Unit of Measure**.
2. On the page that displays, enter the following information:

Field	Required?	Description
Facility	Yes	Facility within the project area that the product is assigned to.
Product Name	Yes	Name of the product you are assigning the unit of measure to.

Field	Required?	Description
		Begin typing the name. After the first three characters, the system will list all products that match your entry.

3. Click the **Assign Unit of Measure** link.

Assign a unit of measure to a product:

1. Under **Unit of Measure**, enter the following information:

Field	Required?	Description
Unit of Measure	Yes	Unit of measure you want to assign (for example, bottle, box, dozen, etc.). If the unit of measure you want to select doesn't display in the list, that means it doesn't exist in the system. New units of measure are added using the Add Unit of Measure process.
Units per UOM (Each)	Yes	Number of items contained in the unit of measure you entered in the **Unit of Measure** field. **Example** If the **Unit of Measure** field is set to **Box** and the **Units per UOM** field is **20**, this means each box contains 20 units.

2. Click the **Add** button. The system saves the unit of measure and displays it on the right side of the page.
3. You may continue configuring units of measure following the above steps.

View existing units of measure

- From the list of items on the right, click the one you want to view.
- When you are done viewing the details, click the **Back** button to display the previous page.

Delete a unit of measure

- Click the trash bin next to the unit of measure you want to delete. A confirmation message displays.
- Click the **OK** button. The system deletes the unit of measure.

Suppliers

- A *supplier* is any manufacturer, retailer, distributor, etc., from which goods are ordered and received.
- Information on all suppliers listed in the Orange Book is preloaded into IMATS.

Search Suppliers

1. On the menu, click **Setup**, **Supplier**, and then **Search Suppliers**.

   Note: When searching, keep in mind that, the more search criteria you enter, the more likely you are to find the supplier you are looking for.

2. Enter information in one or more of the following fields:

Field	Description
Project Area	Project area that receives supplies from the supplier.
Facility	Facility within the project area that receives supplies from the supplier.
Supplier Name	Name of the supplier. Enter the partial or complete name.
Include Global Suppliers check box Does not display for all user roles.	Select if you want to include in the search those suppliers that are part of the common repository of suppliers pre-loaded into IMATS. These suppliers will be displayed in the results, along with the suppliers that meet the search criteria shown in the **Project Area** and **Facility** fields.
State	State where the supplier is located.
Supplier Type	Type of supplier (manufacturer, retailer, distributor, etc.).

3. Click the **Search** button. The results display in the lower portion of the page.

   You can scroll through the list using the page numbers at the bottom of the page.

View or edit a supplier

- Click the link in the **Supplier Name** column to display the supplier's information.

Delete a supplier

- Click the link in the **Supplier Name** column to display the supplier's information.
- Click the **Delete** button. A confirmation message displays.
- Click the **OK** button. The system deletes the supplier.

Perform a new search

- Click the **Clear** button, and then enter new search criteria.

Add a Supplier

1. On the **Setup** menu, click **Supplier**, and then **Add Supplier**.
2. Under **New Supplier**, enter the following information:

Field	Required?	Description
Project Area	No	Project area that is to receive supplies from the supplier. If a project area is not selected, the supplier will be assigned to all project areas.
Facility	No	Facility within the project area that is to receive supplies from the supplier. If a facility is not selected, the supplier will be assigned to all facilities in the project area.
Supplier Name	Yes	Name of the supplier.
Status	Yes	Status of the supplier. • **Active:** Supplier is a viable source of supplies. • **Inactive:** Supplier is **not** a viable source of supplies. **Note:** An inactive supplier is **not** deleted from the system, which means you can still search for it and view its information.
Supplier Type	Yes	Type of supplier (manufacturer, retailer, distributor, etc.).
Notes	No	Any text that you feel would be helpful to include.

3. Under **Address**, enter the following information:

Field	Required?	Description
Address Line 1	No	Supplier's street address.
Address Line 2	No	Continuation line for supplier's street address, if needed.
City	No	City where the supplier is located.
State	No	State where the supplier is located.
Zip Code	No	Supplier's zip code.
County	No	County where the supplier is located.

4. Under **Contact**, enter the following information:

Field	Required?	Description
Name	Yes	Name of the supplier contact.
Title	No	Title of the supplier contact (Mr., Ms., etc.).
Telephone	Yes	Contact's phone number.
Ext	No	Extension of the contact's phone number.
Fax	No	Contact's fax number.
Email	No	Contact's e-mail address.

5. Click the **Add** button. The system saves the supplier and displays it as a hyperlink on the right side of the page.

Edit a Supplier

1. Follow the steps listed in the **Search Suppliers** section to find the product to be updated.
2. Make the necessary updates on the **Edit Supplier** page.
3. Click the **Save** button and then the **Back** button. The system saves the changes you made and displays the previous page.

Units of Measure

- A *Unit of Measure (UOM)* designation is used to indicate how same-type items are grouped together when they are stored, ordered, picked, etc.
- Units of Measure defined in IMATS include *each*, *box*, *case*, and *pallet*.
- Users may assign a UOM to a specific product and define the units per UOM for the product.

Search Units of Measure

When the search results display, you have the option to view or delete a unit of measure.

1. On the **Setup** menu, point to **Unit of Measure**, and then click **Search Units of Measure**.
2. In the **Facility** field, select the facility within the project area that the unit of measure is assigned to.
3. Click the **Search** button. The results display in the lower portion of the page.

   You can scroll through the list using the page numbers at the bottom of the page.

   Delete a Unit of Measure

   Note: A unit of measure cannot be deleted if it is system-defined or if it has been selected as an option in the **Unit of Measure** field in other areas of IMATS.

   Do the following:

   - Click the link in the **Unit of Measure** column to display the unit of measure's information.
   - Click the **Delete** button. A confirmation message displays.
   - Click the **OK** button. The system deletes the unit of measure.

   Perform a new search

   - Click the **Clear** button, and then enter new search criteria.

Add a Unit of Measure

1. On the menu, click **Setup**, **Unit of Measure**, and then **Add Unit of Measure**.
2. Under **New Unit of Measure**, enter the following information:

Field	Required?	Description
Project Area	Yes	Project area the unit of measure is assigned to.

Field	Required?	Description
Facility	Yes	Facility within the project area that the unit of measure is assigned to. Depending on your user role, this field displays **[All Facilities]**, or you can select one or more facilities to assign the unit of measure to. Select a facility or facilities by doing the following: • Click the **Facility** field. A list of facilities displays. • Select the check box next to each facility you want to assign the unit of measure to. • When you're finished, click the **Done** button.
Unit of Measure	Yes	Unit of measure you want to create (for example, bottle, box, dozen, etc.).
Description	Yes	Any text that you feel would describe the unit of measure.
Standard UOM check box	Yes	Designates whether or not the unit of measure contains a specific number of units. Selecting the check box means the units per UOM cannot be modified in other areas of the application. **Example** Assume you are creating a unit of measure of **Dozen**. Since a dozen of anything equals 12, you set the **Units per UOM** to **12**. If you select the **Standard** check box, users will not be allowed to change the units per UOM (say, from 12 to 15) in other areas of the application, such as when receiving items.
Units per UOM Displays if the **Standard UOM** check box is selected.	Yes: If it displays.	Number of items contained in the unit of measure you entered in the **Unit of Measure** field. **Example** If the **Unit of Measure** field is set to **Box** and the **Units per UOM** field is **20**, this means each box contains 20 units.

3. Click the **Add** button. The system saves the unit of measure and displays it on the right side of the page.

Configure Users

Search Users

Search users in your project area and/or facilities.

1. On the menu, click **Setup**, **User**, and then **Search Users**.
2. Enter information in one or more of the following fields:

Field	Description
Email	User's email address. Enter the partial or complete address.
First Name	User's first name. Enter the partial or complete name.
Last Name	User's last name. Enter the partial or complete name.
Status	Status of the user (active or inactive). • **Active:** The user is authorized to perform the tasks granted to him/her when user permissions were assigned. • **Inactive:** The user is **not** authorized to perform the tasks granted to him/her when user permissions were assigned (but he/she still exists in the system).
Role	Select the applicable radio button the Role type (Project Area or Facility). Then select the Role from the drop down list provided.
Project Area Does not display for all user roles.	Project area the user belongs to.
Facility	Facility the user belongs to.

3. Click the **Search** button. The results display in the lower portion of the page.

   You can scroll through the list using the page numbers at the bottom of the page.

   View or edit a user

   - Click the link in the **Name** column to display the user's information.
   - For instructions on editing the user, see **Edit a User**.

Delete a user

- Click the link in the **Name** column to display the user's information.
- Click the **Delete** button. A confirmation message displays.
- Click the **OK**.

Perform a new search

- Click the **Clear** button, and then enter new search criteria.

Add Users

Add users to your project area and/or facilities.

1. On the **Setup** menu, click **User**, and then **Add User**.
2. Under **New User**, enter the following information:

Field	Required?	Description
Title	No	User's title (for example, Mr., Ms., Mrs., Dr.).
First Name	Yes	User's first name.
Middle Name	No	User's middle name.
Last Name	Yes	User's last name.
Suffix	No	User's name suffix (for example, Jr., Sr., MD, RN).

3. Under **User Role**, enter the following information:

Field	Required?	Description
Role	Yes	User's role when using IMATS.
Project Area	Yes	Project area the user roles and the user are assigned to.

4. Under **Address**, enter the following information about the user's home or work location:

Field	Required?	Description
Address Line 1	No	Street address
Address Line 2	No	Continuation line for street address, if needed
City	No	City
State	No	State
County	No	County
Zip Code	No	Zip code

5. Under **Contact**, enter the following information:

Field	Required?	Description
Telephone	Yes	User's phone number.
Ext	No	Extension of the user's phone number.
Secondary Telephone	No	User's second phone number, if available.
Ext	No	Extension of the user's second phone number.
Email Address	Yes	User's email address, used as Username.
Password	Yes	User's password for IMATS.

6. Click the **Next** button.

Assign a facility to the user

- In the **Facility** list, select the check box next to each facility you want to assign. To select/deselect all facilities, select the **Select/Deselect all** check box.
- Click the **Next** button.

Assign permissions to the user

- In the **Available Permissions** list, all permissions are selected. Deselect the check box next to each permission you do not want to assign to the user. To select/deselect all permissions, select the **Select/Deselect all** check box.

  Note: You must select at least one permission.
- Click the **Done** button. The system saves the information you entered, displays the previous page, and displays the user on the right side of the page.

Edit a User

1. Follow the steps listed in the **Search Users** section to find the user to be updated.
2. Make the necessary updates on the **Edit User** page.

   Note: If the user's e-mail address is updated the user must ensure the change is also made in SAMS as the e-mail address is the username in both SAMS and IMATS and the two must match.

3. Click the Save button and then the **Back** button. The system saves the changes you made and displays the previous page.

Custom Roles

Create necessary roles for your project area and/or facilities. For example, a custom role named "Pick Team" may be created with permissions to the Pick and Ship functions only.

Search Custom Roles

1. On the menu, click **Setup**, **Custom Role**, and then **Search Custom Roles**.
2. Click the **Search** button. The results display in the lower portion of the page.
3. You can scroll through the list using the page numbers at the bottom of the page.

View or edit a custom role:

- Click the link in the **Role Name** column to display the role's information.
- For instructions on editing the role, see **Edit a Custom Role**.

Delete a custom role:

- Click the link in the **Role Name** column to display the role's information.
- Click the **Delete** button. A confirmation message displays.
- Click the **OK** button. The system deletes the role.

  Note: If a user(s) is assigned to the custom role, it cannot be deleted.

Perform a new search

- Click the **Clear** button, and then enter new search criteria.

Add a Custom Role

1. On the **Setup** menu, click **Custom Role**, and then **Add Custom Role**.
2. Under **New Custom Role**, enter the following information:

Field	Required?	Description
Role Type	Yes	Designates the level the role is assigned to (for example, facility level).
Role Name	Yes	Name of the custom role.
Description	No	Any text that you feel would be helpful in describing the role.

3. Click the **Next** button to add the permissions.

To assign permissions to the role:

1. Under **New Custom Role Permissions**, enter the following information:

Field	Required?	Description
Project Area	Yes	Project area the role is assigned to.
Facility	Yes	Facility or facilities within the project area the role is assigned to.

2. Under **Permissions**, select the check box next to each permission you want to assign. To select/deselect all permissions, select the **Select/Deselect all** check box.

   Note: You must select at least one permission.

3. When you are done, click the **Add** button. The system saves the information you entered, displays the previous page, and displays the role on the right side of the page.

Edit a Custom Role

1. Follow the steps listed in the **Search Custom Roles** section to find the role to be updated.
2. Make the necessary updates on the **Edit Custom Role** page.
3. Click the **Save** button and then the **Back** button. The system saves the changes you made and displays the previous page.

Funding Sources

- IMATS includes two fields for identifying the funds used to purchase inventory.
- *Funding Source Type* is the field for entering required data selected from this source list: federal, regional, local, tribal, donation, and public health preparedness (PHP).
- *Funding Source* is a field not a mandatory field. It can be used to further identify funds used to buy certain assets.
- The Funding Source Type field is always used to identify the applicable funding source when ordering goods.

Search Funding Sources

1. On the menu, click **Setup**, **Funding Source**, and then **Search Funding Sources**.

   Note: When searching, keep in mind that the more search criteria you enter, the more likely you are to find the funding source you are looking for.

2. Enter information in one or more of the following fields:

Field	Description
Project Area	Project area the funding source is assigned to.
Facility	Facility within the project area that the funding source is assigned to.
Include Global Funding Sources check box Does not display for all user roles.	Select if you want to include in the search those funding sources that are part of the common repository of funding sources pre-loaded into IMATS. These funding sources will be displayed in the results, along with the funding sources that meet the search criteria shown in the other fields.
Funding Source	Name of the funding source. Enter a partial or complete name.
Status	Status of the funding source (Active or Inactive).

3. Click the **Search** button. The results display in the lower portion of the page.

   You can scroll through the list using the page numbers at the bottom of the page.

   Note: An ellipsis displayed after a facility name in the **Facility** column means the funding source is assigned to multiple facilities.

View or edit a funding source

- Click the link in the **Funding Source** column to display the funding source's information.
- For instructions on editing the funding source, see **Edit a Funding Source**.

Delete a funding source:

- Click the link in the **Funding Source** column to display the funding source's information.
- Click the **Delete** button. A confirmation message displays.
- Click the **OK** button. The system deletes the funding source.

Perform a new search

- Click the **Clear** button, and then enter new search criteria.

Add a Funding Source

1. On the menu, click **Setup**, **Funding Source**, and then **Add Funding Source**.
2. Enter the following information:

Field	Required?	Description
Project Area Does not display for all user roles.	Yes	Project area the funding source is assigned to.
Facility	Yes	Facility within the project area that the funding source is assigned to. Depending on your user role, this field displays **[All Facilities]**, or you can select one or more facilities to assign the funding source to. Select a facility or facilities by doing the following: • Click the **Facility** field. A list of facilities displays. • Select the check box next to each facility you want to assign the funding source to. • When you are finished, click the **Done** button.
Funding Source	Yes	Name of the funding source.
Status	Yes	Status of the funding source (**Active** or **Inactive**). Setting the funding source to **Inactive** means it cannot be used in any area of IMATS.

3. Click the **Add** button. The system saves the funding source and displays it on the right side of the page.

Delete a funding source

- Click the trash bin next to the funding source you want to delete. A confirmation message displays.
- Click the **OK** button. The system deletes the funding source.

Edit a Funding Source

1. Follow the steps listed in the **Search Funding Sources** section to find the funding source to be updated.
2. Make the necessary updates on the **View Funding Source** page.
3. Click the **Save** button and then the **Back** button. The system saves the changes you made and displays the previous page.

Chapter 3: Inventory Management Functions

Resupply Requests

- The *Resupply Request* process is used when ordering assets from a source within the IMATS system (i.e., another IMATS facility).
- When a product request is created, IMATS "looks" into the inventory of the facility where the goods are stored and will alert the requestor if the product is not available at that location.
- When products ordered through this process are received, the product-receipt data fields will already be populated.

Search Resupply Requests

1. On the menu, click **Inventory Management**, **Requests**, and then **Search Resupply Requests**.

   Note: When searching, keep in mind that the more search criteria you enter, the more likely you are to find the request you are looking for.

2. Enter information in one or more of the following fields:

Field	Description
Request Number	Product request number. Enter the partial or complete number.
Project Area	Project area that opened the product request.
Facility	Facility within the project area that opened the product request.
Funding Source Type	Type of funding source for the product request items.
Requested From	Facility the products were requested from.
Status	Status of the request. • **Open:** Product request has been submitted by the requesting facility. • **Pending:** A pick list and/or back order has been created for the request. • **Closed:** All items on the request have been received into the requester's system. • **Deleted:** Product request has been cancelled.

Field	Description
Request Date Range From/To	Date the products were requested. Click in the **From** and/or **To** fields and a calendar will display; select the date from the calendar or enter the date in mm/dd/yyyy format.

3. Click the **Search** button. The results display in the lower portion of the page.

View or edit a resupply request:

- Click the link in the **Request Number** column to display the request's information.

Delete a resupply request:

- Click the link in the **Request Number** column to display the product request's information.
- Click the **Delete** button. A confirmation message displays.
- Click the **OK** button. The system deletes the product request.

Perform a new search

- Click the **Clear** button, and then enter new search criteria.

Add a Resupply Request

1. On the **Inventory Management** menu, click **Requests**, and then **Add Resupply Request**.
2. Under **New Request**, enter the following information:

Field	Required?	Description
Request Number	---	The system populates this field with a number that identifies the purchase order.
Project Area	Yes	Project area that is requesting products.
Facility	Yes	Facility within the project area that is requesting products.
Funding Source Type	Yes	Type of funding source for the requested items (state or local, for example).
Funding Source	No	Source of funding for the requested items; the funding sources can be configured by an administrator using the setup menu.
Requested From	Yes	Facility you are requesting the items from.
Status	N/A	The system populates this field with the status of the request.

Field	Required?	Description
Date Requested	Yes	Date the items were requested. The system populates this field with the current date. To change the date, click in the field and a calendar will display; select the date from the calendar or enter the date in mm/dd/yyyy format.
Notes	No	Any text that you feel would be helpful to include.

3. Under **Shipment Information**, enter the following information:

Field	Required?	Description
Request From POC	No	Point of contact at the facility you are requesting the products from. The system populates this field with the name that was entered when the facility was added to IMATS. If desired, you can change the point of contact; note that doing so will change the point of contact only for this request, not for the entire system.
Request From Phone Number	No	Phone number for the point of contact at the facility you are requesting products from. The system populates this field with the number that was entered when the facility was added to IMATS. If desired, you can change the phone number; note that doing so will change the phone number only for this request, not for the entire system.
Shipment Date	No	Date the items were shipped. Click in the field and a calendar will display; select the date from the calendar or enter the date in mm/dd/yyyy format.
Estimated Arrival Date	No	Date the items are estimated to arrive in your facility. Click in the field and a calendar will display; select the date from the calendar or enter the date in mm/dd/yyyy format.
Shipped Via	No	Transportation company used for shipping.
Shipped From	No	Location of the facility that shipped the items.
Tracking Number	No	Shipment tracking number provided by the transportation company.

4. Click the **Next** button to add items to the request.

To add items to the request:

1. Under **Add Item**, enter the following information:

Field	Required?	Description
Product Name	Yes	Name of the product (item) to be added to the request. Begin typing the name. After the first three characters, the system will list all products found in the facility you are requesting items from.
Product Item Number	N/A	The system populates this field with the item's NDC or stock #/model # that was entered when the item was created.
Quantity	Yes	Total number of UOMs being requested. If the **Quantity** field is set to **10** and the **Unit of Measure** field is **Box**, this means you want to order 10 boxes.
Unit of Measure	Yes	UOM of the item being ordered (box, case, etc.).
Notes	No	Any text that would be helpful to include.

2. Click the **Add** button. The system adds the item to the request and lists it on the right side of the page.
3. Continue adding items, or click the **Done** button. The system saves the request and displays the previous page, where you can enter a new request, if desired.

Edit a Resupply Request

1. Follow the steps listed in the **Search Resupply Requests** section to find the request to be updated.
2. Make the necessary updates on the **Edit Resupply Request** and **Edit Item** pages.
3. Click the **Save** button and then the **Back** button. The system saves the changes you made and displays the previous page.

Purchase Orders

- The *Purchase Order* process is used when ordering assets from an external source. For example, a local retailer or manufacturer.
- When inventory ordered through a purchase order is received, the receipt data fields already will be populated.
- Using the purchase order process is not mandatory. Products ordered from external sources can be received into inventory without using the purchase order process. If a purchase order is not used, all necessary data is collected when the product is received using the Add Receipt (w/o PO) process.

Search Purchase Orders

1. On the menu, click **Inventory Management**, **Purchase Order**, and then **Search Purchase Orders**.

   Note: When searching, keep in mind that the more search criteria you enter, the more likely you are to find the order you are looking for.

2. Enter information in one or more of the following fields:

Field	Description
Project Area	Project area that placed the order.
Facility	Facility that placed the order.
PO Number	Purchase order number. Enter the partial or complete number.
Status	Status of the order. • **Closed:** Purchase order has been either filled. • **Deleted:** Purchase order has been deleted. • **Open:** Purchase order has been either partially filled or not filled at all.
Supplier	Supplier of the purchase order items.
Funding Source Type	Type of funding source for the purchase order items.
Order Date Range From/To	Date the order was placed. Click in the **From** and/or **To** fields and a calendar will display; select the date from the calendar or enter the date in mm/dd/yyyy format.

3. Click the **Search** button. The results display in the lower portion of the page.

View a purchase order

- Click the link in the **PO Number** column to display the order's information.

Delete a purchase order

- Click the link in the **PO Number** column to display the purchase order's information.
- Click the **Delete** button. A confirmation message displays.
- Click the **OK** button. The system deletes the purchase order.

Perform a new search

- Click the **Clear** button, and then enter new search criteria

Add a Purchase Order

1. On the menu, click **Inventory Management**, **Purchase Order**, and then **Add Purchase Order**.
2. Under **New Purchase Order**, enter the following information:

Field	Required?	Description
PO Number	---	The system populates this field with a number that identifies the purchase order.
Project Area	Yes	Project area that's placing the order.
Facility	Yes	Facility within the project area that's placing the order.
Funding Source Type	Yes	Type of funding source for the purchase order items (state or local, for example).
Funding Source	No	Source of funding for the purchase order items. Only those funding sources that have an **Active** status are displayed in the list.
Supplier	No	Supplier of the purchase order items. If the supplier you want to select doesn't display in the list, that means it doesn't exist in the system. Click the **Add Supplier** link, and refer to **Add a Supplier** for instructions on adding it to IMATS.
Status	---	The system populates this field with the status of **Open**.

Field	Required?	Description
Date Ordered	Yes	Date the items were ordered. The system populates this field with the current date. To change the date, enter it in mm/dd/yyyy format, or click the **Calendar** button to select a date.
Notes	No	Any text that you feel would be helpful to include.

3. Under **Shipment Information**, enter the following information:

Field	Required?	Description
Supplier POC	No	Point of contact at the supplier location. The system populates this field with the primary contact name that was entered when the supplier was added to IMATS. If desired, you can change the point of contact. Note that doing so will change the name only in this order; the contact name will remain unchanged in the supplier information.
Supplier Phone Number	No	Phone number for the point of contact at the supplier location. The system populates this field with the contact's phone number that was entered when the supplier was added to IMATS. If desired, you can change the number. Note that doing so will change the number only in this order; the phone number will remain unchanged in the supplier information.
Shipment Date	No	Date the items were shipped. Enter a date in mm/dd/yyyy format, or click the **Calendar** button to select a date.
Estimated Arrival Date	No	Date the items are estimated to arrive in your facility. Enter a date in mm/dd/yyyy format, or click the **Calendar** button to select a date.
Shipped Via	No	Transportation company used for shipping.
Shipped From	No	Location of the supplier that shipped the items.
Tracking Number	No	Shipment tracking number provided by the transportation company.

4. Click the **Next** button to add items to the purchase order.

To add items to the purchase order:

1. Under **Add Item**, enter the following information:

Field	Required?	Description
Product Name	Yes	Product name or number of the item you want to add. After you type three characters, the system will list all products that match your entry.
Product Item Number	---	The system populates this field with the item's NDC or stock #/model # that was entered when the item was created.
Quantity	Yes	Total number of units of measure you are ordering. **Example** If the **Quantity** field is set to 10 and the **Unit of Measure** field is Box of 25, this means you are ordering 10 boxes that each contain 25 units.
Unit of Measure	Yes	Unit of measure of the item you are ordering (box of 25, case of 100, etc.). If you don't see the unit of measure, this means it is not assigned to the product. Click the **Assign Unit of Measure for Product** link, and refer to **Assign Unit of Measure to a Product** for instructions.
Notes	No	Any text that you feel would be helpful to include.

2. Click the **Add** button. The system adds the item to the purchase order and lists it on the right side of the page.

Edit an item

- From the list of items on the right, click the one you want to edit.
- Make the updates.
- Click the **Save** button to save the changes.

Delete an item

- Click the trash bin next to the item. A confirmation message displays.
- Click the **OK** button. The system deletes the item from the purchase order.

Receive Inventory

- Receipts (Purchase Order): Receipts resulting from a purchase order to an external supplier.
- Receipts (without Purchase Order): Receipts that are not the result of a purchase order or request.
- Receipts (Request): Receipts resulting from an internal request from another IMATS facility.

Search Receipts

1. On the menu, click **Inventory Management**, **Receive** and then **Search Receipts**.

   Note: When searching, keep in mind that the more search criteria you enter, the more likely you are to find the received item you are looking for.

2. Enter information in one or more of the following fields:

Field	Description
Facility	Facility the received items belong to.
PO/Request Number	Purchase order number or request number associated with the received items you are searching for. Enter a partial or complete number.
Supplier	Supplier of the received items.
Receipt Status	Status of the item. For example, **Accepted**, **Reject Damaged**, etc.

3. Click the **Search** button. The results display in the lower portion of the page.

   View or delete an item

   - Click the link in the **Product** column to display the item's information.

   Perform a new search

   - Click the **Clear** button, and then enter new search criteria.

Add a Receipt (PO)

The following instructions explain how to receive items associated with a purchase order.

1. On the menu, click **Inventory Management**, **Receive** and then **Add Receipt (PO)**.
2. Under **Add Receipt (PO)**, enter the following information:

Field	Required?	Description
Project Area	Yes	Project area the purchase order is assigned to.
Facility	Yes	Facility within the project area that the purchase order is assigned to.
PO Number	Yes	Number listed on the purchase order. After typing three consecutive characters that exist anywhere within the purchase order number, the system will list all purchase orders that match your entry. **Example** If the purchase order number you are interested in is **001 ABC Company**, you could enter "001", "ABC", "Comp", etc.
Item	Yes	Items listed on the purchase order. Select an item you want to receive. **Note:** If the item is on back order, an option to create a shipment for the item displays at the bottom of the page.

3. Under **Receipt Information**, enter the following information:

Field	Required?	Description
Date Received	Yes	Date the item is received into the system. Enter a date in mm/dd/yyyy format, or click the **Calendar** button to select a date.
Storage Location Type	Yes	Type of storage location where the item will be stored.
Storage Location	Yes	Name of the storage location at the facility where the item will be stored. The locations displayed are those that are of the type specified in the **Storage Location Type** field.
Receipt Status	Yes	Status of the item. Select one of the options, depending on the reason you are accepting or rejecting the item.
Serial Number	No	Item's serial number.

Field	Required?	Description
Lot Number	Yes: If the product has an NDC code.	Item's lot number.
Product Expiration Date	Yes: If the product has an NDC code.	Date the item expires. Enter a date in mm/dd/yyyy format, or click the **Calendar** button to select a date.
Quantity	Yes	Number of units of measure you are receiving. **Example** If the **Quantity** field is set to **10** and the **Unit of Measure** field is **Box of 25**, this means you are receiving 10 boxes that each contain 25 units.
Unit of Measure	Yes	Unit of received item (box of 25, case of 100, etc.). If you don't see the unit of measure, this means it is not assigned to the product. Click the **Assign Unit of Measure for Product** link, and refer to **Assign Unit of Measure to a Product** for instructions on assigning it.
Notes	No	Any text that you feel would be helpful to include.

4. If your facility currently has this item on back order, a message displays at the bottom of the page asking if you would like to create a shipment for it.

   Do you see this message?

   - If **Yes**, select either **Yes** or **No** to specify whether or not to create a shipment for the item.
   - If **No**, continue to the next step.

5. Do one of the following:

   - Click the **Add** button.

     This saves the item, including all of its details, but the details are removed from your screen. This is helpful if you want to receive another item of the same type that has different details.

     If the item is fulfilling a back order, the system:

     - Receives the item
     - Creates a pick list
     - Fills the back order
     - Creates a shipment
     - Puts any remaining item quantity on a put away list

If the item is not fulfilling a back order, the system:

- Receives the item
- Puts the item on a put away list

- Click the **Add & Copy** button.

  This saves the item and keeps its details displayed on your screen so you can quickly add the same type of product that has the same details.

View a newly added receipt

- From the list of items on the right, click the one you want to view.
- When you are done viewing the details, click the **Back** button to display the previous page.

Delete a newly added receipt

- Click the trash bin next to the received item. A confirmation message displays.
- Click the **OK** button. The system deletes the item from the list. It still exists on the purchase order, but is no longer received into the system.

Add a Receipt (without PO)

The following instructions explain how to receive items that do not currently have an associated purchase order in the system.

1. On the menu, click **Inventory Management**, **Receive** and then **Add Receipt (without PO)**.
2. Under **Add Receipt (without PO)**, enter the following information:

Field	Required?	Description
Project Area	Yes	Project area that is receiving the items.
Facility	Yes	Facility assigned to the project area that is receiving the items.
Funding Source Type Enabled only if the funding source's status was set to **Active** when it was added to the system.	Yes: If it is enabled.	Type of funding source for the items you are receiving (state or local, for example).
Funding Source	No	Source of funding for the items you are receiving. Only those funding sources that have an **Active** status are displayed in the list.

Field	Required?	Description
Supplier	No	Supplier of the items you are receiving. If the supplier you want to select doesn't display in the list, that means it doesn't exist in the system. Click the **Add Supplier** link, and refer to **Add a Supplier** for instructions on adding it to IMATS.
Notes	No	Any text that you feel would be helpful to include.

3. Click the **Next** button to enter information about the item.

To enter the item information:

1. In the **Product Name** field, start typing the name or number of the item you are receiving.

   After the first three characters, the system will list all products that match your entry.

2. Select the product you are interested in.
3. Click the **Next** button to enter details about the item.
4. Under **Receipt Details**, enter the following information:

Field	Required?	Description
Date Received	Yes	Date the item is received into the system. Enter a date in mm/dd/yyyy format, or click the **Calendar** button to select a date.
Receipt Status	Yes	Status of the item. Select one of the options, depending on the reason you are accepting or rejecting the item.
Storage Location Type	Yes	Type of storage location where the item will be stored.
Storage Location	Yes	Name of the storage location at the facility where the item will be stored. The locations displayed are those that are of the type specified in the **Storage Location Type** field.

Field	Required?	Description
Serial Number Displays if the product was set up in the system as a serialized product.	Yes: If it displays.	Item's serial number.
Lot Number	Yes: If the product has an NDC code.	Item's lot number.
Product Expiration Date	Yes: If the product has an NDC code.	Date the item expires. Enter a date in mm/dd/yyyy format, or click the **Calendar** button to select a date.
Size Displays if the product has a stock #/model #.	No	Product size (medium or large, for example).
Quantity	Yes	Number of units of measure you are receiving. Example If the **Quantity** field is set to **10** and the **Unit of Measure** field is **Box of 25**, this means you are receiving 10 boxes that each contain 25 units.
Unit of Measure	Yes	Unit of measure of the received item (box, case, etc.). If you don't see the unit of measure, this means it is not assigned to the product. Click the **Assign Unit of Measure for Product** link, and refer to **Assign Unit of Measure to a Product** for instructions on assigning it.
Notes	No	Any text that you feel would be helpful to include.

5. If your facility currently has this item on back order, a message displays at the bottom of the page asking if you would like to create a shipment for it.

   Do you see this message?

   - If **Yes**, select either **Yes** or **No** to specify whether or not to create a shipment for the item.
   - If **No**, continue to the next step.

6. Do one of the following:

   - Click the **Add** button.

     This saves the item, including all of its details, but the details are removed from your screen. This is helpful if you want to receive another item of the same type that has different details.

If the item is fulfilling a back order, the system:

- Receives the item
- Creates a pick list
- Fills the back order
- Creates a shipment
- Puts any remaining item quantity on a put away list

If the item is not fulfilling a back order, the system:

- Receives the item
- Puts the item on a put away list

- Click the **Add & Copy** button.

  This saves the item and keeps its details displayed on your screen so you can quickly add the same type of product that has the same details.

  If the item is fulfilling a back order, the system:

  - Receives the item
  - Creates a pick list
  - Fills the back order
  - Creates a shipment
  - Puts any remaining item quantity on a put away list

  If the item is not fulfilling a back order, the system:

  - Receives the item
  - Puts the item on a put away list

View a newly added receipt

- From the list of items on the right, click the one you want to view.
- When you are done viewing the details, click the **Back** button to display the previous page.

Delete a newly added receipt

- Click the trash bin next to the received item. A confirmation message displays.
- Click the **OK** button. The system deletes the item from the list. It still exists on the purchase order, but is no longer received into the system.

Add a Receipt (Request)

The following instructions explain how to receive items associated with a request for products.

1. On the menu, click **Inventory Management**, **Receive** and then **Add Receipt (Request)**.
2. Under **Add Receipt (Request)**, enter the following information:

Field	Required?	Description
Project Area	Yes	Project area receiving the items.
Facility	Yes	Facility within the project area that's receiving the items.
Order Number	Yes	Order number listed on the shipping document for the items. Enter the partial or complete number.
Items	Yes	Items that were shipped to you. Select an item you want to receive into your system. **Note:** If the item you're receiving is currently on back order by your facility, an option to create a shipment for the item displays at the bottom of the page.

3. Under **Receipt Information**, verify the following information (or enter it if the field is blank):

Field	Required?	Description
Date Received	Yes	Date the item is received into the system. Enter a date in mm/dd/yyyy format, or click the **Calendar** button to select a date.
Receipt Status	Yes	Status of the item. Select one of the options, depending on the reason you are accepting or rejecting the item.
Storage Location Type	Yes	Type of storage location where the item will be stored.
Storage Location	Yes	Name of the storage location at the facility where the item will be stored. The locations displayed are those that are of the type specified in the **Storage Location Type** field.
Serial Number	No	Item's serial number.
Lot Number	Yes: If the product has an NDC code.	Item's lot number.
Product Expiration Date	Yes: If the product has an NDC code.	Date the item expires. Enter a date in mm/dd/yyyy format, or click the **Calendar** button to select a date.

Field	Required?	Description
Quantity	Yes	Number of units of measure you are receiving. Example If the **Quantity** field is set to **10** and the **Unit of Measure** field is **Box of 25**, this means you are receiving 10 boxes that each contain 25 units.
Unit of Measure	Yes	Unit of received item (box of 25, case of 100, etc.). If you don't see the unit of measure, this means it is not assigned to the product. Click the **Assign Unit of Measure for Product** link, and refer to **Assign Unit of Measure to a Product** for instructions on assigning it.
Notes	No	Any text that you feel would be helpful to include.

4. If your facility currently has this item on back order, a message displays at the bottom of the page asking if you would like to create a shipment for it.

   Do you see this message?

   - If **Yes**, select either **Yes** or **No** to specify whether or not to create a shipment for the item.
   - If **No**, continue to the next step.

5. Click the **Save** button.

   - If the item is fulfilling a back order, the system:
     - Receives the item
     - Creates a pick list
     - Fills the back order
     - Creates a shipment
     - Puts any remaining item quantity on a put away list
   - If the item is not fulfilling a back order, the system:
     - Receives the item
     - Puts the item on a put away list

Put Away

- The *Put Away* process is used to move inventory from the receiving area to the proper storage location.
- When a receipt is created in IMATS, a put-away list is automatically generated.
- If multiple types of items are received at once, a single put away list will be created for all of the items.
- This process has a quality assurance or verification step for put-away list information to be reviewed and approved.

Search Put Away Lists

1. On the menu, click **Inventory Management** and then **Put Away**.

   Note: When searching, keep in mind that the more search criteria you enter, the more likely you are to find the list you are looking for.

2. Enter information in one or more of the following fields:

Field	Description
Project Area Does not display for all user roles.	Project area the list belongs to.
Facility	Facility within the project area that the list belongs to.
Status	Status of the list. • **Open:** None of the items on the list have been put away or verified, meaning each item has a status of **Open**. • **Put Away, Not Verified:** All items on the list have been put away but not verified, meaning each item has a status of **Put Away, Not Verified**. • **Closed, Verified:** All items on the list have been put away and verified, meaning each item has a status of **Closed, Verified**.

3. Click the **Search** button. The results display in the lower portion of the page.

   You can scroll through the list using the page numbers at the bottom of the page.

View a put away list

- Click the link in the **PO Number** column to display the list's information.

Print a put away list

- Click the link in the **PO Number** column to display the list's information.
- Click the **Print List** button and then the **Print This Page** button to print the list.

Designate items as put away

- Click the link in the **PO Number** column to display the list's information.
- Select the items to be marked put away by checking the check box to the left of the item name.
- Select the **Put Away** button.

Perform a new search

- Click the **Clear** button, and then enter new search criteria.

Verify Items on a Put Away List

1. Search for the list whose items you want to verify (see **Search Put Away Lists**), and select the list to display its information.
2. Click the **Verify Put Away** button. The page that displays lists all items that have a **Put Away** status.
3. For each item you want to verify, look at the location in the **Put Away Location** column to make sure it's correct.

   If the word **Multiple** is listed, this means the item is located in multiple inventory locations. Click the word to view the locations.

4. To assign an item to a different location, click the link in the **Put Away Location** column (if you haven't already done so), and then click the **Update Put Away Locations** link.
5. After you have determined that each item's information is correct, select the check box next to each item you want to verify. To select/deselect all items, select the **Select/Deselect** all check box.
6. Click the **Verified** button. The status of all the items changes to **Closed, Verified.**

   Note: If **all** items on the list have been verified, the status of the entire list changes to **Closed, Verified**.

Pick

- The *Pick List* process is used when filling an order from a customer.
- This process has a verification step that must be completed in order for a shipment authorization to be created in the system.
- The *Request for Products* process is used when ordering countermeasures assets from a source within the IMATS system (i.e., another IMATS facility).
- When a user initiates a products request, IMATS creates a *Pick Request* for the facility from which goods are being ordered.
- The pick list is then created from the *Pick Request.*

Search Pick Lists

1. On the menu, click **Inventory Management**, **Pick**, and then **Search Pick List**.

   Note: When searching, keep in mind that the more search criteria you enter, the more likely you are to find the list you are looking for.

2. Enter information in one or more of the following fields:

Field	Description
Project Area	Project area the list belongs to.
Facility	Facility within the project area that the list belongs to.
Order Number	Number that IMATS automatically generated and assigned to the pick list when it was created. This number is used to track orders that have come in via a purchase order or a request for products.
PO Number	The PO number is the customer's tracking number, if provided. This number is printed on the shipping document and is for the customer's reference only. For pick lists that fulfill a request for product, this is the request number.
Status	Status of the list. • **Open:** There is at least one item on the list that has not been marked as picked. A list is open until **all** items have been marked as picked. • **Picked**: All items on the list have been marked as picked. • **Closed:** All items on the list have been marked as verified, cancelled, or back ordered.

3. Click the **Search** button. The results display in the lower portion of the page.

   You can scroll through the list using the page numbers at the bottom of the page.

   View or edit a pick list

   - In the **Order Number** column, select the order number associated with the pick list to display its information.

   Print a pick list:

   - Click the link in the **Order Number** column to display the list's information.
   - Click the **Print List** button to print the list.

   Perform a new search

   - Click the **Clear** button, and then enter new search criteria.

Add a Pick List

1. On the menu, click **Inventory Management**, **Pick**, and then **Add Pick List**.
2. Under **New Pick List**, enter the following information:

Field	Required?	Description
Project Area	Yes	Project area where the items will be picked.
Facility	Yes	Facility within the project area where the items will be picked.
Order Number	---	System-generated number assigned to the purchase order you received for items to be shipped from your facility (this is different from the actual PO number on the order). This number is used to track the order in the system.
Order Date	Yes	Date the items were ordered. Click in the field and a calendar will display; select the date from the calendar or enter the date in mm/dd/yyyy format.
PO Number	No	Customer’s tracking number, if provided. This number is printed on the shipping document and is for the customer’s reference only.
PO Date	Yes	Date listed on the purchase order. Click in the field and a calendar will display; select the date from the calendar or enter the date in mm/dd/yyyy format.

Field	Required?	Description
Ship To	Yes	Facility the picked items will be shipped to.
Notes	No	Any text that you feel would be helpful to include.

3. Click the **Next** button to add items to the pick list.

To add items to the list:

1. Under **New Pick List Item** in the **Product Name** field, start typing the name or number of the item you are adding.

   After the first three characters, the system will list all products that match your entry.

2. Did a message display stating that the product is **not** in the facility?

   - If **No**, this means the item is available in inventory. Continue to step 3.
   - If **Yes**, this means the item is not available in inventory and the system will generate a back order for it.

3. Enter the information shown below.

Field	Required?	Description
Quantity to Pick	Yes	Total number of units of measure to be picked. **Example** If the **Unit of Measure** field is **Box of 25**, and the **Quantity to Pick** field is set to **10**, this means you want to pick 10 boxes that each contain 25 units. The system will mark the item Discrepant if the quantity to pick is greater than the inventory available in the warehouse.
Unit of Measure	Yes	Unit of measure of the item you are ordering (box of 25, case of 100, etc.). If you don't see the unit of measure, this means it is not assigned to the product. Click the **Assign Unit of Measure for Product** link, and refer to **Assign Unit of Measure to a Product** for instructions on assigning it.
Notes	No	Any text that you feel would be helpful to include.

Field	Required?	Description
Qty Picked Located under the **Storage Locations** heading.	Yes	Quantity to pick from each storage location. The quantity listed in the **Available Qty** field takes into account any items that are currently allocated to another pick list. Because allocated items haven't yet been picked, the available quantity might be less than the actual quantity in your warehouse inventory. A **Caution** icon next to the item's expiration date means the item has expired.

4. Click the **Add** button. The system adds the item to the pick list displays it on the right side of the page.

Search Pick Requests

1. On the menu, click **Inventory Management**, **Pick**, and then **Search Pick Requests**.
2. Enter information in one or more of the following fields:

Field	Description
Project Area	Project area that received the product request.
Facility	Facility within the project area that received the request.
Requested By	Facility that's requesting the products.
Request Number	Product request number. Enter the partial or complete number.
Status	Status of the request. • **Open:** Product request has been submitted by the requesting facility. • **Pending:** A pick list and/or back order has been created for the request. • **Closed:** All items on the request have been received into the requester's system. • **Deleted:** Product request has been cancelled.
Request Date Range From/To	Date the products were requested. In the **From** and/or **To** fields, enter a date in mm/dd/yyyy format, or click the **Calendar** button to select a date.

3. Click the **Search** button. The results display in the lower portion of the page.

   You can scroll through the list using the page numbers at the bottom of the page.

   To perform a new search, click the Clear button, and then enter new search criteria.

Create a Pick List for a Pick Request

1. Follow the steps in the **Search Pick Requests** section to find the request you want to create a list for, and then select it to display its information.
2. Select the check box next to each product you want to include on the pick list. To select/deselect all items, select the check box in the **Select** column heading.
3. Click the **Create Pick List** button. The system does the following:
   - Creates a pick list for items that are in stock.
   - Creates a back order for items that are not in stock.
   - Changes the status of the product request from **Open** to **Pending**.

   View the pick list

   - Note the pick list number displayed at the top of the page. When you search for the pick list, this is the number you'll enter in the **Order Number** field.
   - Continue to **Search Pick Lists**.

   View the back order (if one was created)

   - Note the back order number displayed at the top of the page.
   - Continue to **Search Back Orders**.

Back Order

Search Back Orders

1. On the menu, click **Inventory Management**, **Back Order**, and then **Search Back Orders**.

   Note: When searching, keep in mind that the more search criteria you enter, the more likely you are to find the back order you are looking for.

2. Enter information in one or more of the following fields:

Field	Description
Project Area	Project area that generated the back order.
Facility	Facility that generated the back order.
Back Order Number	Back order number. Enter the partial or complete number.
PO Number	Number listed on the purchase order received for items to be shipped from the facility. Enter the partial or complete number.
Status	Status of the back order. • **Open:** All items on the back order have not been marked as shipped and/or cancelled. A back order is open until all items have been marked as either shipped or cancelled. • **Closed:** All items on the back order have been marked as shipped and/or cancelled.

3. Click the **Search** button. The results display in the lower portion of the page.

   You can scroll through the list using the page numbers at the bottom of the page.

   Edit a back order (if it has an **Open** status)

   - In the **Back Order Number** column, select the back order to display its information.

     For instructions on editing the back order, see **Edit a Back Order**.

   View a back order

   - In the **Back Order Number** column, select the back order to display its information.

Perform a new search

- Click the **Clear** button, and then enter new search criteria.

Add a Back Order

The following instructions explain how to create a back order for items that need to be shipped but are not currently in your inventory.

1. On the menu, click **Inventory Management**, **Back Order**, and then **Add Back Order**.
2. Under **New Back Order**, enter the following information:

Field	Required?	Description
Project Area	Yes	Project area that is back ordering the items.
Facility	Yes	Facility within the project area that is back ordering the items.

3. Under **Back Order**, enter the following information:

Field	Required?	Description
Back Order Number	---	System-generated number that is used to track the back order in the system.
Date Ordered	Yes	Date the items were back ordered. The system populates this field with the current date. To change the date, enter it in mm/dd/yyyy format, or click the **Calendar** button to select a date.
PO Number	Yes	Number listed on the (customer) purchase order you received for items to be shipped from your facility. This number is not used to track the back order in the system. The back order number is used for tracking purposes, instead.
PO Date	Yes	Date listed on the purchase order. Enter a date in mm/dd/yyyy format, or click the **Calendar** button to select a date.
Ship To	Yes	Facility the back ordered items will be shipped to.
Notes	No	Any text that you feel would be helpful to include.

4. Click the **Next** button to add items to the back order.

To add items to the back order:

1. Under **New Back Order Item**, enter the following information:

Field	Required?	Description
Product Name	Yes	Product name or number of the item you want to add. After you type three characters, the system will list all products that match your entry.
Product Item Number	---	The system populates this field with the item's NDC or stock #/model # that was specified when the product was entered into the system.
Quantity	Yes	Total number of units of measure you are back ordering. **Example** If the **Quantity** field is set to **10** and the **Unit of Measure** field is **Box of 25**, this means you want to back order 10 boxes that each contain 25 units.
Unit of Measure	Yes	Unit of measure of the item you are ordering (box of 25, case of 100, etc.). If you don't see the unit of measure, this means it is not assigned to the product. Click the **Assign Unit of Measure for Product** link, and then refer to **Assign Unit of Measure to a Product** for instructions on assigning it.
Notes	No	Any text that you feel would be helpful to include.

2. Click the **Add** button. The system adds the item to the back order and lists it on the right side of the page.

Edit an item

- From the list of items on the right, click the one you want to edit.
- Make the necessary updates.
- Click the **Save** button to save the changes.

Delete an item from the back order

- Click the trash bin next to the item you want to delete. A confirmation message displays.
- Click the **OK** button. The system deletes the item from the back order.

Edit a Back Order

1. Follow the steps listed in the **Search Back Orders** section to find the back order to be updated.
2. Make the necessary updates on the **Edit Back Order** and **Edit Item** pages.
3. Click the **Save** button and then the **Back** button. The system saves the changes you made and displays the previous page.

Shipment

Search Shipments

1. On the menu, click **Inventory Management**, and then **Shipment**.

   Note: When searching, keep in mind that the more search criteria you enter, the more likely you are to find the shipment you are looking for.

2. Enter information in one or more of the following fields:

Field	Description
Order Number	Number assigned to the shipment's order when the pick list was created. This number, which is different from the purchase order number, is used to track the order in the system. Enter the partial or complete number.
PO Number	Purchase order number assigned by the customer who is receiving the shipment when they created the purchase order and sent it to the shipping facility. Enter the partial or complete number.
Project Area Does not display for all user roles.	Project area the items were shipped from.
Ship From	Facility the items were shipped from.
Ship To	Facility the items were shipped to.
Status	Status of the shipment. • **Open:** The pick list associated with the shipment has been verified, but the items have not yet been shipped. • **Hold:** Shipment has been stopped or delayed for some reason. • **Pending:** Items are waiting to be shipped. • **Shipped:** Items have been shipped. • **In Transit:** The shipment is in transit to the destination. • **Complete:** The sending facility has received confirmation that the shipment has reached its destination.
Shipment Date Range From/To	Date the items were shipped. In the **From** and/or **To** fields, enter a date in mm/dd/yyyy format or click the **Calendar** button to select a date.

3. Click the **Search** button. The results display in the lower portion of the page.

   You can scroll through the list using the page numbers at the bottom of the page.

   Export the search results to a Microsoft Excel spreadsheet

   - Click the **Export to Excel** button. The **File Download** window opens.
   - Click **Open** to display the spreadsheet on-screen, **Save** to save it to your computer, or **Cancel** to exit the window.

   View or edit a shipment

   - In the **Order Number** column, select the order number associated with the shipment to display the shipment's information.

     For instructions on editing the shipment, see **Edit a Shipment**.

   Print a shipping document or pallet labels

   - In the **Order Number** column, select the order number associated with the shipment whose shipping document or pallet labels you want to print.
   - On the page that displays, click the **Print Shipping Document** or **Print Pallet Labels** button.

   Perform a new search

   - Click the **Clear** button, and then enter new search criteria.

Edit a Shipment

1. Follow the steps listed in the **Search Shipments** section to find the shipment to be updated.
2. Under **Edit Shipment**, select a status in the **Status** field, if desired.

   Each shipment has a status. The status definitions are shown below.

   - **Open:** The pick list associated with the shipment has been verified, but the items have not yet been shipped.
   - **Hold:** Shipment has been stopped or delayed for some reason.
   - **Pending:** Items are waiting to be shipped.
   - **Shipped:** Items have been shipped.
   - **In Transit:** The shipment is in transit to the destination.
   - **Complete:** The sending facility has received confirmation that the shipment has reached its destination.

     Note: Shipments with a status of **Complete** cannot be edited.

3. Under **Shipment Information**, make any necessary changes to the information shown below.

Field	Required?	Description
Customer Pickup check box	No	Select if the customer picked up the shipment, instead of having it shipped.
Total No. Pallets	No	Total number of pallets being shipped.
Shipment Date Enabled only if the **Customer Pickup** check box is not selected.	Yes: If it is enabled.	Date the items were shipped. To enter a date, enter it in mm/dd/yyyy format, or click the **Calendar** button to select a date.
Shipped Via Enabled only if the **Customer Pickup** check box is not selected.	Yes: If it is enabled.	Transportation company used for shipping.
Shipped Via text box Enabled only if **Other** is displayed in the **Shipped Via** list.	Yes: If it is enabled.	Transportation company used for shipping
Tracking Number Enabled only if the **Customer Pickup** check box is not selected.	No	Shipment tracking number provided by the transportation company.
Pickup Date Enabled only if the **Customer Pickup** check box is selected.	Yes: If it is enabled.	Date the customer picked up the shipment.
Pickup POC Enabled only if the **Customer Pickup** check box is selected.	Yes: If it is enabled.	Name of the person who picked up the shipment.
POC Phone Number Enabled only if the **Customer Pickup** check box is selected.	Yes: If it is enabled.	Phone number of the person who picked up the shipment.
Notes	No	Any text that you feel would be helpful to include.

4. Under **Items**, enter a different quantity for one or more items, if desired.
5. Click the **Save** button and then the **Back** button. The system saves the changes you made and displays the previous page.

Push Package

- IMATS contains a Push Package Import feature that enables project area users to import the inventory data supplied in the push package file supplied by CDC's Division of Strategic National Stockpile.
- The push package import process bypasses the receipt and put away processes. Instead, the data are entered directly into the project area's inventory database.
  - During importing, each container number in the package is imported as a new storage location.
  - All items in a container, as well as the container itself, are added as inventory items at the new location.

Import a Push Pack File

1. On the menu, click **Inventory Management** and then **Push Package**.
2. Under **Push Package Import**, enter the following information:

Field	Required?	Description
Project Area	Yes	Project area receiving the push package.
Facility	Yes	Facility within the project area receiving the push package.
Push Package File	Yes	File containing the push package data you want to import. Do one of the following: • Enter a filename. • Click the **Browse** button to select the file.

3. Click the **Preview** button. The push package file displays so that you can make sure it is the one you want to import.
4. Is the correct file displayed?
   - If **Yes**, continue to the next step.
   - If **No**, click the **Cancel** button, and repeat the steps above.
5. Click the **Import** button. A confirmation message displays stating that each container in the file will be listed as a storage location in IMATS. Additionally, items in each container will be listed as items within the storage location. **Note that the import cannot be undone.**
6. Click the **Import** button again. The system imports the file from your computer and processes it so that you can view the push package containers and their contents.

Inventory

- IMATS enables users to manually adjust inventory levels when necessary.
- The *Move Inventory* process documents that assets from one storage location have been moved to a new storage location within the same facility.
- The *Transfer Inventory* process documents that assets from one facility have been moved to another facility.

Search Inventory

1. On the menu, click **Inventory Management**, **Inventory**, and then **Search Inventory**.

   Note: When searching, keep in mind that the more search criteria you enter, the more likely you are to find the inventory item you are looking for.

2. Enter information in one or more of the following fields:

Field	Description
Facility	Facility within the project area where the item is located. Depending on your user role, you can select specific facilities to search on. Do the following: • Click the **Facility** field. A list of facilities displays. • Select the check box next to each facility you want to search on. • When you're finished, click the **Done** button.
Storage Location	Storage location where the item is stored. Enter one or more characters that the storage location begins with.
Product Name	Product name or number of the item you are searching for. Enter one or more characters that the name begins with.
Funding Source Type	Funding source type assigned to the item.
Funding Source	Funding source assigned to the item.
Expiration Date Before	Date that comes after the expiration date of products you're searching on. For example, you might choose to enter a date two weeks in the future to retrieve products that will expire within that two-week period.
Include Expired Products?	Select whether or not to include expired products in your search results.

3. Click the **Search** button. The results display in the lower portion of the page.

   You can scroll through the list using the page numbers at the bottom of the page.

   Export the search results to a *.tsv file

   - Click the **Export** button.
   - When prompted, click **Open** to display the file, **Save** to save it to your computer, or **Cancel** to exit the window.

   View or edit an inventory item

   - In the **Product Name/Item Number** column, click the link to display the item's information.

   Perform a new search

   - Click the **Clear** button, and then enter new search criteria.

Add Inventory

1. On the **Inventory Management** menu, point to **Inventory**, and then click **Add Inventory Item**.
2. Under **Add Inventory Item**, enter the following information:

Field	Required?	Description
Facility	Yes	Facility within the project area where the item is located.
Product Name	Yes	Product name or number of the item you want to add. After you type three characters, the system will list all products that match your entry.
Product Item Number	---	The system populates this field with the item's NDC or stock #/model # that was specified when the product was entered into the system.
Storage Location Type	Yes	Type of storage location where the item will be stored.
Storage Location	Yes	Name of the storage location where the item will be stored. The locations displayed are those that are of the type specified in the **Storage Location Type** field.

Field	Required?	Description
Serial Number	No	Item's serial number.
Lot Number	Yes	Item's lot number.
Product Expiration Date	Yes	Date the item expires. Click in the field and a calendar will display; select the date from the calendar or enter the date in mm/dd/yyyy format.
Funding Source Type Enabled only if the funding source's status was set to **Active** when it was added to the system.	Yes: If it is enabled.	Type of funding source (for example, state or local).
Funding Source Enabled only if the funding source's status was set to **Active** when it was added to the system.	No	Name of the funding source.
Quantity	Yes	Total number of units located in inventory. **Example** If the **Quantity** field is set to **10** and the **Unit of Measure** field is **Box**, this means 10 boxes are located in inventory.
Unit of Measure	Yes	How the item is packaged (for example, bottle, box, etc.).
Units per UOM	Yes	Number of items contained in the unit of measure you entered in the **Unit of Measure** field. **Example** If the **Unit of Measure** field is set to **Box** and the **Units per UOM** field is **20**, this means each box contains 20 units.

3. Click the **Add** button. The system saves the item and displays it on the right side of the page.

Edit an item

- From the list, click the item you want to edit.
- Continue to the **Edit Inventory Item** page.
- Make the necessary updates.
- Click the **Save** button to save the changes.

Delete an item

- Click the trash bin next to the item you want to remove. A confirmation message displays.
- Click the **OK** button. The system deletes the item from the system.

Move Inventory

The following instructions explain how to move inventory from one storage location to another.

1. On the menu, click **Inventory Management**, **Inventory**, and then **Move Inventory**.
2. Under **Move Inventory**, do the following:
   - In the **Project Area** field, select the project area that contains the locations you are moving inventory from/to.
   - In the **Facility** field, select the facility that contains the locations.
3. Under **Storage Locations**, enter the following information:

Field	Required?	Description
From Location	Yes	Location you want to move the inventory from. Begin typing the location name. After the first three characters, the system will list all locations in the facility that match your entry.
To Location	Yes	Location you want to move the inventory to. Begin typing the location name. After the first three characters, the system will list all locations in the facility that match your entry.
Reason for Move	No	Reason for moving the inventory.

4. Under **Select Inventory to Move**, the contents for the storage location shown in the **From Location** field are displayed. For each item you want to move, enter the quantity in the Quantity to Move field.
5. Click the **Move** button. The system moves the products to the specified storage location.

Transfer Inventory

The Inventory Transfer process allows users to transfer inventory from one facility to another, bypassing the Pick, Ship, and Receive processes. The transaction will not be visible on the dashboard and there is no paper trail like what is provided by picking and shipping inventory to another facility, but it can be tracked using the Inventory Audit Trail report. Follow the steps below to transfer inventory.

1. On the menu, click **Inventory Management**, **Inventory**, and then **Transfer Inventory**.
2. If the **Project Area** field is available, select the project area that contains the location you are transferring inventory from.
3. Under **Storage Locations**, enter the following information:

Field	Required?	Description
From Facility	Yes	Facility you want to transfer the inventory from.
From Location Type	No	Type of location you're transferring the inventory from (for example, **Cold Storage**, **Damaged**, etc.).
From Location	Yes	Name of the location you're transferring the inventory from.
To Facility	Yes	Facility you want to transfer the inventory to.
To Location Type	No	Type of location you're transferring the inventory to (for example, **Cold Storage**, **Damaged**, etc.).
To Location	Yes	Name of the location you're transferring the inventory to.
Reason To Transfer	No	Reason for transferring the inventory.

4. The contents for the storage location shown in the **From Location** field are displayed. For each item you want to transfer, enter the quantity in the **Quantity to Move** field.
5. Click the **Transfer** button. The system transfers the products to the specified storage location.

   Note: The record of this transaction will be available only in the Inventory Audit Trail report. To see this record, follow the steps in the **Inventory Audit Trail Report** section.

Dispense

- IMATS enables users to account for inventory that has been dispensed at a point of dispensing (POD).
- The *Add Dispensed Countermeasures* process requires that the POD is configured in IMATS as a facility and POD inventory is current.

Add Dispensed Countermeasures

1. On the **Inventory Management** menu, point to **Dispense**, and then click **Add Dispensed Countermeasures**
2. Under **Add Dispensed Countermeasures**, enter the following information:

Field	Required?	Description
Facility	Yes	Facility within the project area where the item is located.
Product Name	Yes	Product name or number of the item you want to add. After you type three characters, the system will list all products that match your entry. Select a product. A grid will display listing all inventory for the selected product.
Product Item Number	---	The system populates this field with the item's NDC or stock #/model # that was specified when the product was entered into the system.
Dispensed	Yes	Total number of units dispensed.
Dispensed Date	Yes	Date the countermeasure was dispensed

3. Click the **Save** button. The system saves the dispensed quantity and adjusts inventory accordingly.

Search Dispensed Countermeasures

1. On the menu, click **Inventory Management**, **Dispense**, and then **Search Dispensed Countermeasures**.

   Note: When searching, keep in mind that the more search criteria you enter, the more likely you are to find the inventory item you are looking for.

2. Enter information in one or more of the following fields:

Field	Description
Facility	Facility within the project area where the item is located.
Product Name	Product name or number of the item you are searching for. Enter one or more characters that the name begins with.
Dispensed Date Range From/To	Date the countermeasure was dispensed. Click in the **From** and/or **To** fields and a calendar will display; select the date from the calendar or enter the date in mm/dd/yyyy format.
Include Expired Products?	Select whether or not to include expired products in your search results.

3. Click the **Search** button. The results display in the lower portion of the page.

   You can scroll through the list using the page numbers at the bottom of the page.

Export the search results to a *.tsv file

- Click the **Export** button.
- When prompted, click **Open** to display the file, **Save** to save it to your computer, or **Cancel** to exit the window.

View or edit an inventory item

- In the **Product** column, click the link to display the item's information.

Perform a new search

- Click the **Clear** button, and then enter new search criteria.

Chapter 4: Reports

Reports can be viewed and exported in either PDF or Microsoft Excel format.

When working with reports, you will need one of the following, depending on your particular preference:

- Adobe Acrobat Reader version 8.0 or higher to view reports as PDF documents
- Microsoft Excel version 2007 or higher to view reports in spreadsheets

Inventory Report

Four options are available for completing the Inventory Report.

- The *Inventory by County* identifies the quantities of products on-hand and available for allocation. The reported is grouped by county.
- The *Inventory by County with Event* identifies the quantities of products on-hand and available for allocation, quantities in-transit to another facility and quantities dispensed. The report is grouped by county.
- The *Inventory by Site Type* identifies the quantities of products on-hand and available for allocation. The report is grouped by site type, county, and zip code.
- The *Inventory by Site Type with Event* identifies the quantities of products on-hand and available for allocation, quantities in-transit to another facility and quantities dispensed. The report is grouped by site type, county, and zip code.

1. On the menu, click **Reports** and then **Inventory Report**.
2. Is the **Select Facilities** field displayed?
   - If **Yes**, continue to **Select facilities**.
   - If **No**, continue to **Select products**.

Select facilities

1. Do one of the following:
   - Select **All Facilities** or a single facility.

Select report option & run the report

1. Under **Report Options**, select the type of report you want to generate by selecting the appropriate radio button.
2. Do one of the following:
   - Click the **View PDF** button to view the report as a PDF document.
   - Click the **View Excel** button to view the report in a spreadsheet.

Count Inventory Report

Two options are available for completing the Count Inventory Report.

- The *Count Inventory Snapshot* identifies the quantities of selected products on-hand and available for allocation, and the quantities of on-hand products allocated for shipment.
- The *Count Inventory Detail* lists, for a range of selected dates for a specified facility (or facilities), the quantity that was:
  - requested by the facility,
  - received by the facility and accepted (stored as inventory),
  - received by the facility, but rejected for some reason (perhaps because it was damaged), and
  - shipped from the facility. This quantity includes shipments with a status of Shipped, In Transit, or Complete.

1. On the menu, click **Reports** and then **Count Inventory Report**.
2. Is the **Select Facilities** field displayed?
   - If **Yes**, continue to **Select facilities**.
   - If **No**, continue to **Select products**.

Select facilities

1. Do one of the following:
   - Select the **All Facilities** check box to report on all facilities. Continue to **Select products**.
   - Click the **Select Facilities** link to report on specific facilities. Continue to step 2.
2. Do you know at least one letter in the facility name?
   - If **Yes**, enter one more letters in the **Filter facility by name** field.
   - If **No**, continue to the next step.
3. Click the **Find** button.
   - If you entered search criteria, the system displays the facilities that match the criteria.
   - If you did not enter search criteria, the system displays all facilities that you are authorized to view.
4. Click the check box next to each facility you want to report on.
5. Click the **Select** button. The facilities display on the right side of the page.

6. If desired, click the trash bin next to a facility to remove it from the selection list.
7. Click the **Done** button. The system saves your selection(s) and displays the previous page.
8. Continue to **Select products**.

Select products

1. Under **Select Products**, do one of the following:
   - Select the **All Products** check box to report on all products located in the project areas and/or facilities you selected. Continue to **Select report options & run the report**.
   - Click the **Select Products** link to report on specific products. Continue to step 2.
2. Do you know at least one letter in the product name?
   - If **Yes**, enter one more letters in the **Find products by name** field.
   - If **No**, continue to the next step.
3. Click the **Find** button.
   - If you entered search criteria, the system displays the products that match the criteria.
   - If you did not enter search criteria, the system displays all products that you are authorized to view.
4. Click the check box next to each product you want to report on.
5. Click the **Select** button. The products display on the right side of the page.
   - To remove a product from the list, click the trash bin next to it.
6. Click the **Done** button. The system saves your selection(s) and displays the previous page.
7. Continue to **Select report options & run the report**.

Select report options & run the report

8. Under **Report Options**, select the type of report you want to generate by doing one of the following:
   - Select **Count Inventory Snapshot**, and continue to step 2.
   - Select **Count Inventory Detail**.
     - In the **Start Date** and **End Date** fields, enter the beginning and ending dates in the range you want to report on. If desired, click the **Calendar** button to select a date.
9. Do one of the following:
   - Click the **View PDF** button to view the report as a PDF document.
   - Click the **View Excel** button to view the report in a spreadsheet.

Audit Trail Report

Two options are available for completing the Audit Trail Report.

- The *Inventory Audit Trail* report provides information regarding additions and updates to inventory data (receipts, purchase orders, inventory, etc.)
- The *Administrative Audit Trail* report provides a list a transactions pertaining to user management as well as login/logout transactions.

Inventory Audit Trail Report

1. On the menu, click **Reports**, **Audit Trail**, and then **Inventory Audit Trail**.
2. Under **Enter Report Time Period**, enter the beginning and ending dates in the range you want to report on.
3. Under **Select Facility**, select the facility you want to run the report for.
4. Under **Select Report Type**, select the type of report you want to run.
   - **Report all tasks for selected dates**

     List of all tasks performed and related attributes during a specific time period.
   - **Report by storage location**

     List of all tasks performed and related attributes for a selected location during a specific time period.
   - **Report by purchase order**

     List of all tasks performed and related attributes associated with a specific purchase order during a specific time period.
   - **Report by user**

     List of all tasks performed and related attributes by a specific user during a specific time period.
5. Click the **View Report** button. The report displays on the next page.
   - To see details about a particular task, click the link in the **Task Type** column. You can scroll through the report by using the page numbers at the bottom of the page.
6. Do one of the following:
   - Click the **View PDF** button to view the report as a PDF document.
   - Click the **View Excel** button to view the report in a spreadsheet.

   Note: The detailed information for each transaction is available only in the Excel file.

Administrative Audit Trail Report:

1. On the menu, click **Reports**, **Audit Trail**, and then **Administrative Audit Trail**.
2. Under **Enter Time Period**, enter the beginning and ending dates in the range you want to report on. If desired, click the **Calendar** button to select a date.
3. Under **Select Facility**, select the facility you want to run the report for (this is an optional step).
4. Under **Select Report Type**, select the type of report you want to run.
   - **User management audit trail**

     List of all tasks performed and specific attributes for user management activity (adding, editing, and deleting users) during a specific time period.
   - **Login/logout audit trail**

     List of all user logins to and logouts from the system during a specific time period.
5. Click the **View Report** button. The report displays on the next page.
   - To see details about a particular task, click the link in the **Task Type** column. You can scroll through the report by using the page numbers at the bottom of the page.
6. Do one of the following:
   - Click the **View PDF** button to view the report as a PDF document.
   - Click the **View Excel** button to view the report in a spreadsheet.

Chapter 5: Data Exchange

The Data Exchange feature in IMATS enables state level users to respond to an Inventory Data Exchange (IDE) request from the CDC.

CDC sends an IDE request only during a public health emergency. The IDE request contains a list of products the CDC would like inventory counts for, as well as the frequency of the reporting.

Data Exchange Process (Public Health Administrators)

The following steps illustrate how the Data Exchange feature collects inventory count information and then integrates it into IMATS. The Data Exchange feature is available only to those with the Public Health Administrator role.

1. From the IDE application, CDC DSNS creates and sends a request for inventory count information to participating project area IMATS users.
2. IMATS automatically creates an IDE report using the current project area data found in IMATS.
3. For IMATS users that collect data from local-level health departments, a data exchange export function is available and provides the ability to convert the IDE request into either an Excel spreadsheet or an XML file. This file can then be sent to the local-level health departments via e-mail, fax or other mode of transmission.
4. The local-level health departments enter the necessary data into the file and return it to the sender via e-mail, fax or other mode of transmission.
5. IMATS Data Exchange provides an import function for the local data. This function imports data contained in the Excel spreadsheets and XML files received from the local-level health departments and adds it to the IDE Report.
6. The project area user reviews and approves the IDE report and then sends the report to CDC DSNS via IMATS Data Exchange.

Search Inventory Count Requests

1. On the **Data Exchange** menu, click **Search Requests**.
2. Enter search criteria, and then click the **Search** button.
3. To view details of a request, click the link in the **Request Name** column to display the request.
4. To collect data from local health department not using IMATS select the **Export Excel** button at the top of the page. This along with the valid values listed in **APPENDIX F: Facility Type Valid Values** are provided to the local health departments for inventory data collection.

Field	Description
Request #	ID assigned to the request.
Request Name	Name assigned to the request.
Request Status	Status of the request. • **Active:** The current request in the system for which reports are created and sent. • **Closed:** A request that is no longer current; it has been replaced by a more recent request.

Search and/or Send Inventory Count Reports to CDC

1. On the Data Exchange menu, click **Search Reports**.
2. Enter search criteria, and then click the **Search** button.
3. To view details of a report, click the link in the **Report Name** column to display the report.
4. To import inventory data counts received from local health departments select the **Import Inventory Counts** button.
   - Select the **Browse** button to navigate to the file for importing.
   - Select **Upload Data** button to import the local inventory.
5. To send the report to the CDC, click the **Send** button.

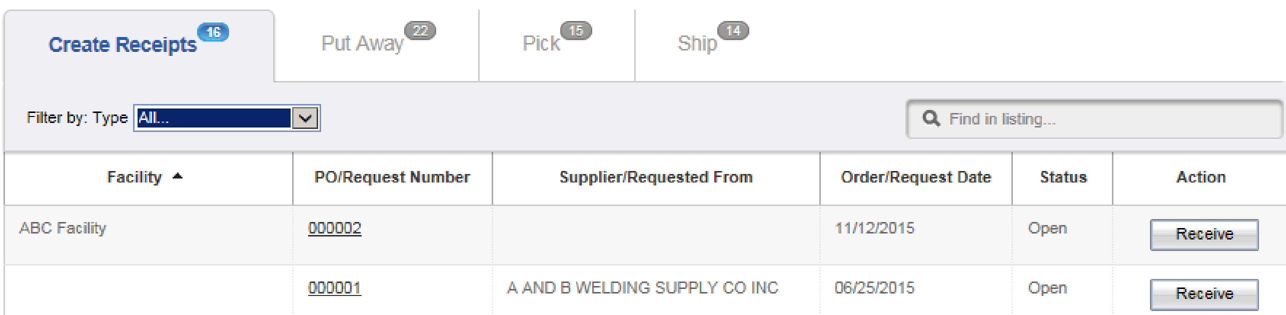
Field	Description
Report Status	Status of the report. • **Pending:** IMATS has generated the report, but it has not yet been sent to the CDC. • **Sent:** The report has been sent to the CDC.

Chapter 6: Dashboard

Users have a dashboard showing all items in Open status for their facility or facilities. The dashboard contains the following four tabs:

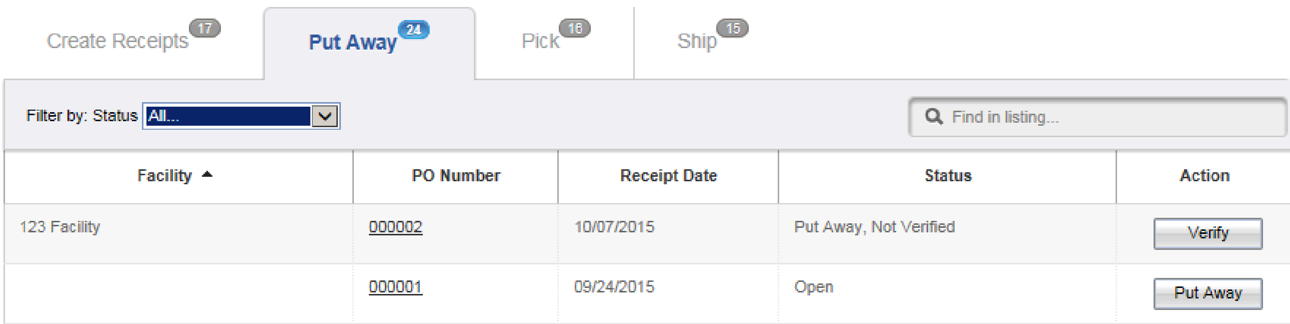
- Create Receipts
- Put Away
- Pick
- Ship

Create Receipts Tab



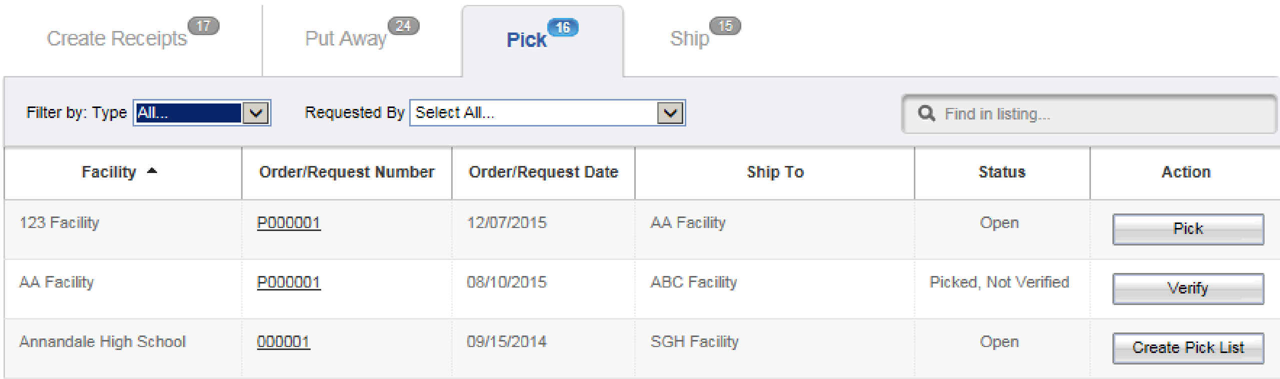
- This tab lists purchase orders (POs) in the Open status and requests in the Open or Pending status.
- The PO/Request Number is a hyperlink to the **Edit Purchase Order** or **Edit Request** page.
- The Action column contains a button labeled **Receive**. When clicked, the user will navigate to the **Add Receipt (PO)** or **Add Receipt (Request)** page.

Put Away Tab



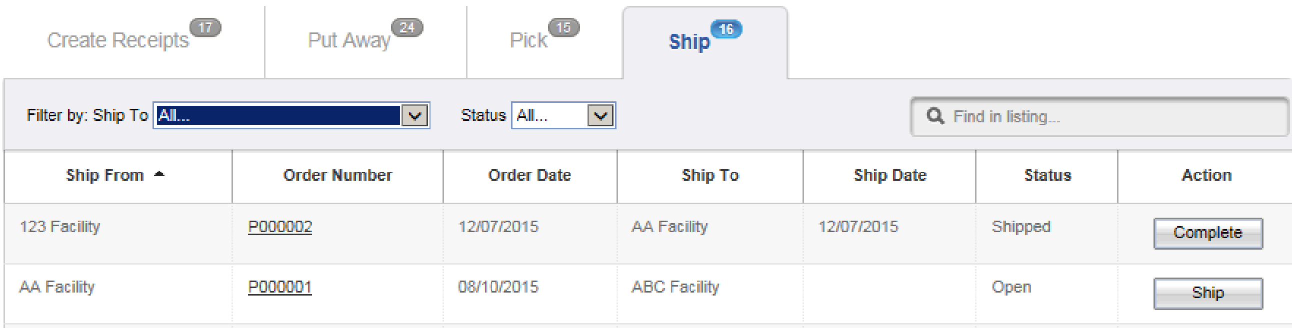
- This tab lists all put away lists in the Open or Put Away, Not Verified status.
- The PO Number includes a hyperlink to the **Edit Put Away** page.
- The Action column contains the following:
  - Button labeled **Verify** for lists in the Put Away, Not Verified status. When clicked, an overlay displays items that have been put away. The user has two options: Verified (to verify and close the put away) and Cancel.
  - Button labeled **Put Away** for lists in the Open status. When clicked, the user navigates to the **Edit Put Away List** page.

Pick Tab



- This tab displays pick lists in the Open or Picked, Not Verified status and requests (pick requests) in the Open status.
- The Order/Request Number includes a hyperlink to the **Edit Pick List** page for orders only. For requests, the hyperlink navigates to the **Request Detail** page.
- The Action column contains the following:
  - Requests: Button labeled **Create Pick List** that navigates to the **Request Detail** page
  - Pick lists in Open status: Button labeled **Pick** that navigates to the **Edit Pick List** page
  - Pick lists in the Picked, Not Verified status: Button labeled **Verify** that displays the verify overlay

Ship Tab



- This tab lists shipments in all statuses except Complete.
- The Order Number includes a hyperlink to the **Edit Shipment** page.
- The Action column contains the following:
  - Button labeled **Complete** for shipments in the Shipped or In Transit statuses. This will close the shipment.
  - Button labeled **Ship** for shipments in the Open, Pending or Hold status. The **Ship** button navigates to the **Edit Shipment** page like the hyperlink.

APPENDIX A: IMATS Implementation Process

All IMATS users must go through the CDC Secure Access Management Services (SAMS) identity proofing process prior to accessing the system. Please follow the steps below.

1. Send an email to ctshelp@cdc.gov stating that you would like to implement IMATS.
2. Provide the first name, last name, email address, phone number, role, and facility (if applicable) of individuals in your organization who will need access to the system.

   There are two main roles available in IMATS as well as custom roles, so please choose from the following:

   - **Public Health Administrator (PHA)**: User with high-level management or oversight responsibilities for a project area*. The PHA role should only be given to individuals at the project-area level who require access to ALL facilities in the project area. By default, a PHA in a project area can view and edit ALL items associated with ALL facilities in the project area.

     **Project areas: CDC's 62 Public Health Emergency Preparedness grantees, which include 50 states, District of Columbia, Chicago, New York City, Los Angeles, three U.S. territories, and five freely associated states.*

   - **Facility Administrator:** User who manages one or more facilities. The facility administrator role should be used for administrators that do not fit in the PHA role. This role may be used for local or regional managers. Facility administrators are able to access and edit ALL items in each facility to which they have access and can create new facility administrator accounts with the same or fewer permissions. Each facility administrator can have multiple facilities assigned to him.
   - **Custom Role:** User assigned to a single facility that will be given a custom role. The Countermeasure Tracking Systems (CTS) team will create user accounts for all PHAs and Facility Administrators. The PHA or Facility Administrator will be responsible for creating custom roles for specific users.

3. Complete the SAMS identity proofing process. Each individual will receive an email from sams-no-reply@cdc.gov once he or she has been added to SAMS with instructions on how to complete the process (click SAMS training presentation for a presentation that details this process).

APPENDIX B: Setup Options

A PHA in a project area who has chosen to use IMATS as the sole inventory management system has many options when setting up IMATS. The three approaches below provide an idea of what is possible; however, PHAs may choose to implement the system in their own ways.

Configure All

In this approach, the PHA would configure **all** facilities and users in the project area. The PHA may also set up all of the custom roles to be used by each facility.

This approach would have the PHA set up the top-level storage facilities in the project area and the administrator for each facility. For example, if Project Area A had two state facilities (RSS 1 and RSS 2), the PHA would configure a facility for each of these sites and would add a Facility Administrator for each. It would then be the responsibility of the two RSS Administrators to configure IMATS for their facility, as well as to add the facilities at the next level down, as shown in Figure 1.

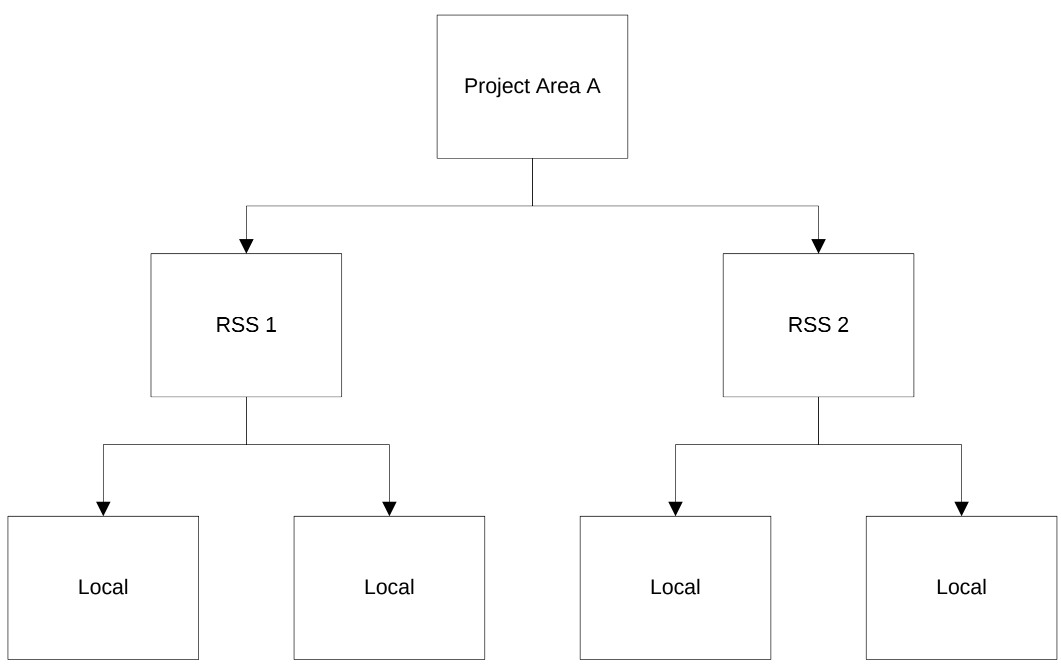


Figure 1: Project Area Facilities

As Needed

In this approach, each administrator is responsible for his or her facility or facilities. The administrator would only configure the suppliers, custom roles, users, etc. needed by the subject facility.

APPENDIX C: Tasks

The following tasks provide users with general steps to perform to become familiar with IMATS functionality. These tasks should be performed in the IMATS Training environment. A scenario is provided to give context to the tasks.

Scenario

A public health emergency has occurred in your project area and local areas need supplies to dispense to affected citizens. The Division of Strategic National Stockpile has notified you that 700 cases of doxycycline are being sent to one of your receipt, stage, and store (RSS) sites.

Task 1: Search for a Facility

Timber Ridge Elementary School has been selected to act as a new point of dispensing (POD) for the current public health emergency. You will begin distributing supplies to Timber Ridge.

Search to see if the school exists in your system as a facility.

1. Use the system to attempt to locate Timber Ridge Elementary School.
2. Proceed to the next task.

Task 2: Add a Facility

Currently, new facilities have no users assigned by default.

Add Timber Ridge Elementary School to your system. They have one loading dock and fork lift. Assign Timber Ridge Elementary School to your task lead.

1. Add a new facility using the following information:
   - Facility: Timber Ridge Elementary School
   - Phone: 404-555-1212
   - Contact: John Smith
   - Email: jsmith@cobb.edu
2. Create a secondary contact.
3. Complete adding a facility.
4. Proceed to the next task.

Task 3: Create a Custom Role

Create a custom role in your warehouse using the following information:

1. Create your new custom role and enter the required information.
2. The screen defaults to your project area and facility (if only one available).
3. Role: Name your role (for example, “Pick Team”).
   - Custom Role Name: ______________________________
4. Review the results by searching the custom roles.
5. Proceed to the next task.

Task 4: Add a New User

So that another person in your staff may manage the receipt of the items, create a user, and assign that user a role.

1. Create your new user and enter their required information.
2. Assign your new user the role you created in the last task.
3. Assign that user to the facility you created.
4. Grant your new user all permissions.
5. Complete adding a new user.
6. Note the new user to use in further tasks.
   - First Name: ______________________________________
   - Last Name: __________________________________
7. Review the results by searching the user.
8. Proceed to the next task.

Task 5: Assign the Facility to the New User

This task cannot be performed until Timber Ridge Elementary School is assigned to the user performing the steps.

Assign Timber Ridge Elementary School to your new user.

1. Select **User** from the **Setup** menu.
2. Assign Timber Ridge Elementary School to your new user.
3. Proceed to the next task.

Task 6: Add a New Supplier

A local retailer has donated medical supplies to your warehouse. This retailer does not currently exist in your system.

1. Locate the **Supplier** screen.
2. The screen defaults to your project area and facility.
3. Define the vendor's name and abbreviation (for example, "local vendor" or "LV").
4. Define status and type.
5. Enter in placeholder data for their phone number and email.
6. Proceed to the next task.

Task 7: Set Up Your Warehouse

Create a location in your warehouse using the following information:

1. The screen defaults to your project area and facility (if only one available).
2. Location: Name your location (for example, “REC-1A”).
   - Location: ______________________________
3. Location status: available.
4. Review the results by searching the locations.
5. Repeat the step above to add a receiving area location.
6. Proceed to the next task.

Task 8: Set Up Your Warehouse – Add Range

Create a range of locations in your warehouse using the following information:

1. The screen defaults to your project area and facility.
   - Location: 1st floor
   - Storage level: Start range (a to z)
   - Storage level: End range (1 to 10)
2. Proceed to the next task.

Task 9: Assign a Unit of Measure to a Product

1. Assign a unit of measure (cases with 50 units per case) to a product.
   - Doxycycline 100mg oral tablet, #20 tab unit of use
   - NDC – 24658-220-20

   Note: This unit of measure is just for testing and may not be a true unit of measure for this product. This NDC pertains to a bottle containing 20 tablets. The unit of measure reflects how many units (in this case bottle) are in a case or pallet.

2. Proceed to the next task.

Task 10: Add a Purchase Order

The truck carrying the 700 cases of doxycycline from DSNS is expected to arrive at RSS site in six hours. Place your expected material into IMATS by creating an order to DSNS.

1. Create a new purchase order. The screen defaults to your project area and facility.
2. Add the item (begin typing to populate the items available).
   - Doxycycline 100mg oral tablet, #20 tab unit of use, NDC – 24658-220-20
3. Add 700 cases with 50 units per case. This is the unit of measure you added in task 10.
4. Complete adding the order (which will generate purchase order [PO] #).
5. Write down the PO # for later use.
   - PO #: ____
6. Review the results by searching order.
7. Proceed to the next task.

Task 11: Receive Your Purchase Order

The truck carrying the supplies has arrived at your RSS site. The supplies have been unloaded and stored in a temporary holding area. Add these additional items into your inventory using IMATS.

1. Select **Receipt** from the menu.
2. Locate the purchase order.
3. Select the purchase order and follow the link to receive against each item in that purchase order.
4. Enter date received, receipt location, quantity, and other required information.
5. Select a receiving location:
   - Location: ________________________________
6. Complete adding the receipt.
7. Note the temporary holding location.
8. Verify inventory levels in the location.

   Hint: There are two ways to find this information: navigate to the **Storage Location** screen or search the inventory.
9. Proceed to the next task.

Task 12: Put Away the Items

You have requested that your floor staff move the doxycycline shipment to a different holding area. They have done this.

1. Select **Put Away** from the menu.
2. Locate the purchase order.
3. Select the purchase order and follow the link to assign put away location.
4. Select a put-away location.
   - Location: ___________________.

   Hint: Select Load All Locations to show all available locations from the drop-down.
5. Select and put away the item.
6. Print the put-away list by selecting **Print List**.
7. Proceed to the next task.

Task 13: Confirm that Your Items have been Put Away

Due to the presence of untrained volunteers assisting in the movement of your doxycycline shipment, you ask your regular staff to confirm that all 700 cases of doxycycline were put away together.

1. Locate the purchase order.
2. Confirm the put away by verifying the item.
3. Verify inventory levels in the location.

   Hint: There are two ways to find this information: navigate to the **Storage Location** screen or search the inventory.

4. Proceed to the next task.

Task 14: Create a Pick List

You have received an order from Timber Ridge Elementary School. Create a pick list of the items that your warehouse staff will take off your shelves.

1. Create a new pick list.
2. Enter in PO # **12345**.
3. Select **Project Area** and **Facility**.
4. Select **Timber Ridge Elementary School** as the ship-to facility to receive the items.
5. Add 400 cases of **Doxycycline 100mg oral tablet, #20 tab unit of use, 20 bot** to your pick list.
6. To select the product, begin typing the item's name in the product name.
7. Fulfill the pick from the locations provided.
8. After entering the item, save the pick list.
9. Note the order number to use in further steps.
   - Order Number: ____
10. Proceed to the next task.

Task 15: Pick and Verify the Pick List

You and several volunteers have picked the items off the shelves and stored them at the loading dock. Mark your pick list as Picked.

1. Locate the pick list created in the previous task.
2. Print the pick list by selecting **Print List**.
3. Select and pick the items.
4. Select and verify the items.
5. Verify remaining inventory levels in the location.

   Hint: There are two ways to find this information: navigate to the **Storage Location** screen or search the inventory.

6. Proceed to the next task.

Task 16: Find Your Shipment and Edit Details

Locate your shipment and enter shipment details. Timber Ridge Elementary School is stocked to capacity and would like you to move your shipping date one week. Edit your shipment details by setting its status to Hold. The shipment will be sent by truck. Print your invoice.

1. Locate your shipment.
2. Edit your shipment details and enter shipment information.
3. Print pallet labels and shipping document.
4. Proceed to the next task.

Task 17: Receive Items without Purchase Order

A local supplier has donated 100 bottles of 45 mg strength Tamiflu to your warehouse. Each bottle contains 40 tablets. In addition, the supplier has promised to provide regular shipments of Tamiflu for as long as the public health emergency continues. The items that were donated have reached your warehouse.

1. Select **Receive** from the menu.
2. Add a new receipt.
3. The screen defaults to your project area and facility.
4. Enter supplier, funding source, product, location, quantity, and other required information.
5. Select a receipt location.
   - Location: ________________________________
6. Verify updated inventory levels in the location.

   Hint: There are two ways to find this information: navigate to the **Storage Location** screen or search the inventory.
7. Do “put away” as explained in previous tasks.

APPENDIX D: Glossary

The following table lists common terms used throughout IMATS.

Term	Definition
Allocated Quantity	The total quantity of a product found on pick lists that have not been verified.
Available Quantity	The total quantity of a specific product found in a facility minus the total quantity of a product found on pick lists that have not been verified (on-hand quantity - allocated quantity).
Back Order	A process for handling requested items that are not available in inventory.
Custom Role	A role assigned to a user that has been customized with specific permissions required for the user to perform his/her job tasks.
Data Exchange	The process used for exchanging requests for inventory counts from CDC to project areas and reports of inventory counts from project areas to CDC.
Data Exchange Report	A collection of inventory counts for a specific project area and reporting date usually generated by the project area and transmitted to CDC.
Data Exchange Request	A request made by CDC to the project areas for a report of inventory counts of specific products.
Facility	Any place where inventory is stored. This could be a distribution center, warehouse or a store room within a hospital.
Funding Source	The entity that supplies monies for products.
In-Transit Quantity	The total quantity of items on their way to another facility. This is the quantity found on shipments that are not marked with a status of Complete.
Inventory	Items stored in a facility.
Inventory Management and Tracking System (IMATS)	IMATS allows state and local public health providers to track medical and non-medical countermeasure inventory and supplies during daily operations or a public health emergency. This solution tracks quantity of inventory and facilitates warehouse operations, including receiving, staging, and storing inventory.
Item Number	The National Drug Code (NDC) or stock number for a product.

Term	Definition
Jurisdiction	Locality, as defined by the project area not the CDC, within the project area where a facility is located.
Move Inventory	Process used to move items from one storage location to another within a facility.
National Drug Code (NDC)	The unique numeric identifier for a packaged pharmaceutical as recognized by the Food and Drug Administration (FDA).
Non-Pharmaceutical	A product that is not a prescription drug. Examples include personal protective equipment and medical/surgical supplies or equipment.
On-Hand Quantity	The total quantity of a specific product found in a facility. This quantity includes allocated items but does not include items in-transit.
Pharmaceutical	A drug or medicine used in medical treatment.
Pick	The process of selecting or pulling items from storage in order to fill a request for products.
Product	Configuration information for a pharmaceutical or non-pharmaceutical item. This is basic information, such as name and number. This is not to be confused with actual inventory information. Details such as lot number and quantity are part of inventory data.
Project Area	A recipient of funds from CDC's Public Health Emergency Preparedness (PHEP) cooperative agreement. The 62 recipients include 50 states, Washington, D. C., Chicago, Los Angeles, New York City, and eight territories and freely associated states.
Purchase Order	A list of products that a facility requests from a supplier.
Push Package File	A push package file contains information about containers (and their contents) received from the Division of Strategic National Stockpile (DSNS) during a national public health emergency.
Put Away	The process used to move items from a receiving area to storage location.
Receipt	Process used to identify incoming items. There are three processes: Receipt (PO) for receiving goods order with a purchase order, Receipt (Request) for receiving items ordered using the request process and Receipt (without PO) for receiving items that were not ordered.
Region	Geographic region or other area (as defined by the project area, not the CDC) within the project area where a facility is located.

Term	Definition
Request	A list of products that a facility requests from another IMATS facility.
Ship From	The facility that is shipping items.
Ship To	The facility that is receiving items.
Standard Unit of Measure	A unit of measure that has a constant number of units. For example, "Dozen" will always have twelve units.
Storage Location	A physical location within a facility. For example, "Receiving Dock 1A" or "Shelf 1A3C".
Strength	The amount of active ingredient present in each dosage (for example, 500 mg).
Supplier	Any entity that provides products. This could be a vendor, manufacturer (maker of the product), or a facility.
Transfer Inventory	Process used to transfer items from one facility to another facility.
Type of Distribution Site	Designates the type of distribution site a facility is. For example, treatment center, point of dispensing, etc.
Unit of Measure (UOM)	The unit used for counting items, such as case, box, pallet or each.

APPENDIX E: RSS Site Priority Valid Values

The following table lists the valid values for RSS site priority. Use the abbreviation for import files.

RSS Site Priority	Abbreviation
Primary	P
Secondary	S
Tertiary	T

APPENDIX F: Facility Type Valid Values

The following table lists the valid values for Facility Type. Use the abbreviation for import files.

Facility Type	Abbreviation
Alt. Care Facility	ALTCARE
Commercial Pharm	COMMPHARM
Community Clinic, Othr	COMMCLNC
Correctional Facilities	CORRECTIONS
Fed Facilities	FEDFAC
Fed Qualified Comm Hlth Clinic	FEDHLTHCLNC
Hospital	HOSP
Indian Health Svc	HIS
Local Health Dept	LHD
Nursing Home/Assisted Living	NURSHOME
Other	OTHR
POD, Closed	POD-C
POD, Open	POD-O
Private Physician	PRIVPHYS
Storage Facility	STRGFAC
Tribal Govt	TRIBAL
Visiting Nurse/Home Hlth	VISITNURS